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ABSTRACT

This curriculum guide recommends the essential content for high school programs in business education in South Carolina. It contains course outlines which are based on competencies needed in the labor market and/or for personal business management. The guide contains 20 course descriptions which are arranged in alphabetical order. Each course is presented according to the following format: description, purpose, topical outline, competencies, objectives, learner checklist, and formal rating sheet. Courses contained in the curriculum are accounting 1, accounting 2 with computer applications, business communications, business English, business law, business mathematics, business principles and management, business data processing 1 and 2, introduction to business, machine dictation and transcription, office machines, office supervision and management, recordkeeping 1 and 2, shorthand 1 and 2, typewriting 1 and 2, and word processing. Appendixes to the guide provide a suggested equipment list by course title, recommended grading scales for keyboarding and shorthand, and suggestions for organizing a local Future Business Leaders of America chapter. (KC)

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# BUSINESS EDUCATION CURRICULUM GUIDE

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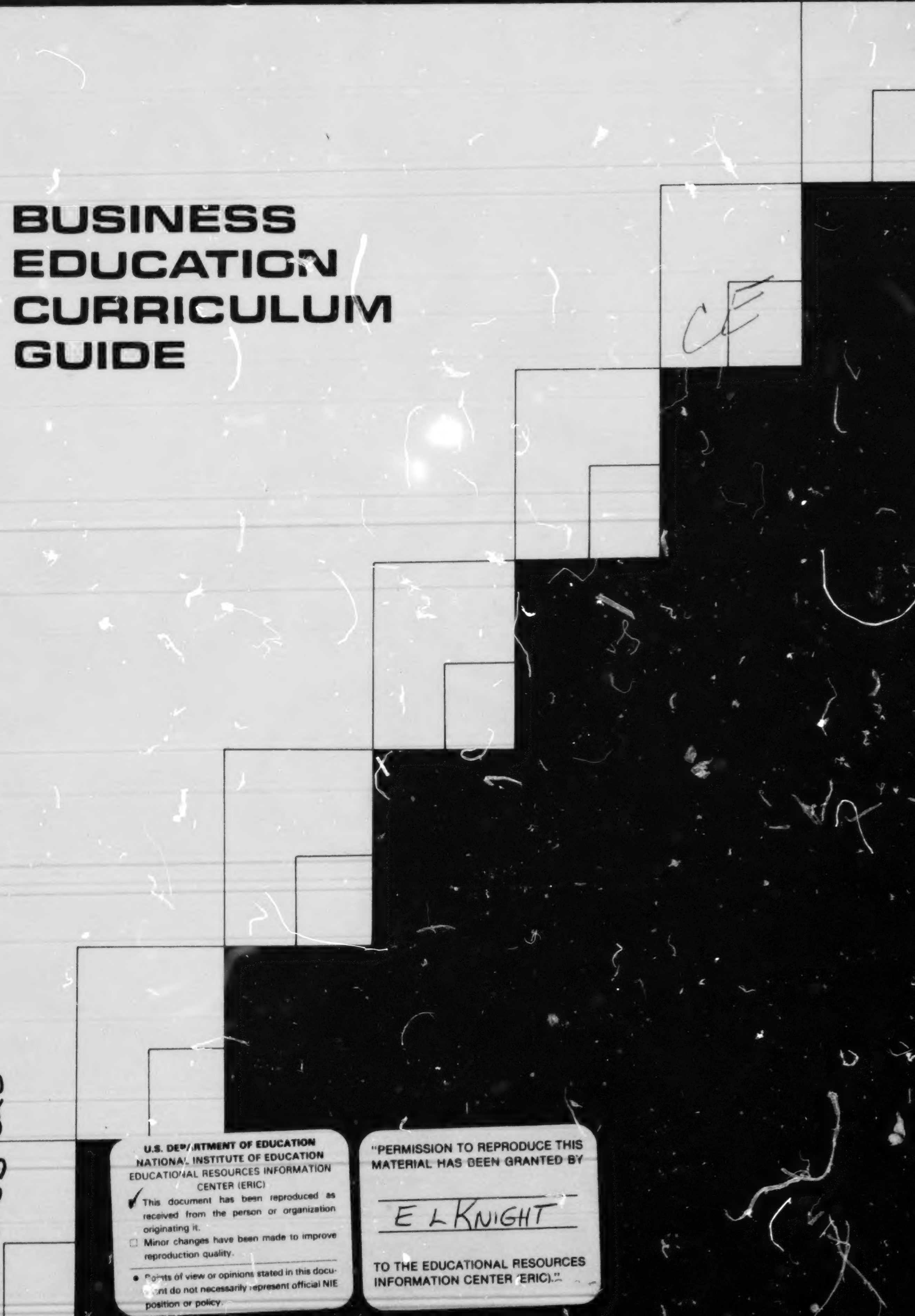

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Columbia, South Carolina 29201

# FOREWORD

Business occupations ranks among the fastest-growing career fields of this decade. An executive with one of the major chains of national employment agencies maintains that individuals seeking careers in this field ". . . will have no trouble at all finding a job or advancing in a career as long as (they) have the background and preparation required." Comprehensive secondary programs in business education have the potential to provide the basic preparation for individuals to enter these careers.

The *Business Education Curriculum Guide* has been designed to identify competencies which are basic to a business education curriculum. Recommended course outlines and objectives are presented; thus, teachers across South Carolina will be able to prepare their students with uniform and appropriate competencies for use in the labor market.

Although the *Guide* is comprehensive, teachers will be able to select the content which is applicable to the instructional offerings in their schools. Teachers are encouraged to use creativity as they adapt the materials to meet the particular needs of their students.

J. Andrea Kelly
State Supervisor
Business and Office Education

# ACKNOWLEDGMENTS

One of the major purposes of the Business Education Section of the Office of Vocational Education is to establish and maintain standards for the operation of an effective curriculum. One step toward the realization of this purpose is the development of competency-based course outlines.

The *Business Education Curriculum Guide* includes competency-based course outlines for use in the instruction of basic business education courses. Initiated in June 1980, the development was assumed by a committee of South Carolina's business education teachers. Sharing their writing talents and teaching skills were:

Nancy Bush
Ann Byrd
Joan Caughman
Kathryn Cliatt
Delores Goggins

Barbara Reid
Betty Rentz
Tess Skinner
Elizabeth Tarbox

Review and revision of the initial product were the responsibilities of a second committee of experienced teachers:

Anne Arnold
Nancy Hawkins
Beatrice Jenkins

Nancy Odom
Jane Snapp
Kate Stone

Special appreciation is extended to these dedicated educators. Gratitude is also extended to Patricia Wilson, former Business Education Curriculum Specialist with the Vocational Education Media Center, Clemson University, who executed a leadership role in the development of this *Guide*.

J. Andrea Kelly, State Supervisor
Business and Office Education

Ellen T. Hayden, Curriculum Designer
Vocational Curriculum Development

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# INTRODUCTION

The purpose of the *Business Education Curriculum Guide* is to recommend the essential content for high school programs in business education. The course outlines which are presented are based on competencies needed in the labor market and/or for personal business management.

## Organization of the Guide

The courses are addressed separately and are arranged in alphabetical order. Each course is presented according to the following format:

- Description
- Purpose
- Topical outline
- Competencies
- Objectives
- Learner checklist
- Formal rating sheet

The appendices present resource material which complements the body of the *Guide.* Appendix A contains a suggested equipment list by course title. Appendix B provides recommended grading scales for keyboarding and shorthand. Finally, Appendix C identifies steps to follow in the organization of a local Future Business Leaders of America Chapter.

## Suggestions for Using the Guide

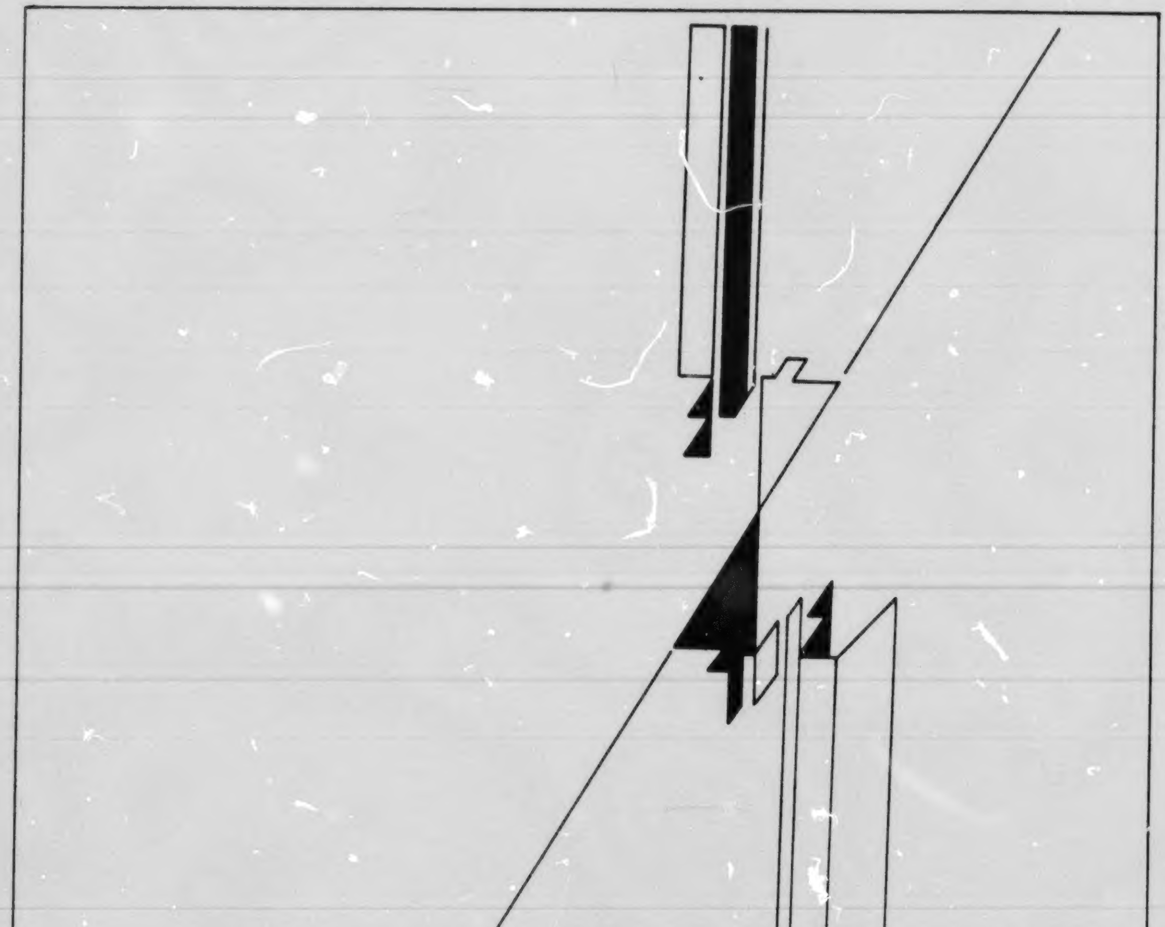
The *Guide* is designed to assist in the planning or revising of a business education course(s) or a total program. For the purpose of expediency the authors suggest that the user of the *Guide* follow three steps:

1) Review the outline, competencies, objectives, etc., for those courses which the user now teaches.

2) Compare the recommended approach in the *Guide* to the user's current approach to the teaching of a course(s).

3) Revise the course(s) which the user teaches to reflect appropriate improvements.

The content of the *Guide* has significance for both the beginning and experienced teacher. Teachers within a school district should carefully review the information to assess the appropriateness and adaptibility for their particular setting.



# ACCOUNTING I

# ACCOUNTING I

## Description

This course is designed to provide an introduction to double-entry accounting principles and procedures as they apply to a proprietorship, partnership, and corporation.

## Purpose

The purpose of Accounting I is to provide students with entry-level skills in the accounting profession as a general accounting clerk and/or to provide students with a foundation for study in Accounting II.

# COURSE OUTLINE – ACCOUNTING I

I. Accounting Cycle

- A. Opening a set of books
- B. Analyzing the effects of business transactions
- C. Journalizing and posting business transactions
- D. Proving the accuracy of posting
- E. Completing the end-of-fiscal-period work

II. Combination Journal and Subsidiary Ledgers

- A. Processing transactions for a merchandising business
- B. Completing banking activities
- C. Completing the end-of-fiscal-period work for a merchandising business

III. Automated Data Processing

- A. Starting an automated accounting system
- B. Processing transactions and end-of-fiscal-period work

IV. Payroll Systems

- A. Preparing payroll records
- B. Processing payroll transactions

V. Special Journals

- A. Processing purchases, cash payments, and related general transactions
- B. Processing sales, cash receipts, and related general transactions
- C. Using a cash register system and petty cash

VI. Special Transactions

- A. Recording sales tax and other sales and purchase systems
- B. Recording uncollectible accounts
- C. Recording transactions affecting plant assets
- D. Processing data affecting notes
- E. Calculating accrued revenue and expenses

VII. Partnerships and Corporations

- A. Recording transactions affecting partnerships
- B. Accounting procedures for corporations

## COMPETENCIES – ACCOUNTING I

The student is required to demonstrate the following competencies in order to complete successfully Accounting I.

| | | |
|---|---|---|
| I-VII | 1. | Define accounting terms associated with each topic. |
| IA | 2. | Classify accounts as to assets, liabilities, and capital. |
| IA | 3. | Prepare a balance sheet. |
| IA | 4. | Record the opening entry in the general journal. |
| IA | 5. | Arrange a chart of accounts. |
| IA | 6. | Open accounts in a general ledger and post the opening entry to the general ledger. |
| IB | 7. | Analyze business transactions into debit and credit parts using T-accounts. |
| IC | 8. | Record business transactions in a general journal and a cash journal. |
| IC | 9. | Post from a general journal to a general ledger. |
| IC | 10. | Post from a cash journal to the ledger. |
| ID | 11. | Prepare a trial balance. |
| IE | 12. | Prepare a six-column worksheet. |
| IE | 13. | Prepare an income statement. |
| IE | 14. | Prepare a balance sheet. |
| IE. | 15. | Close the ledger. |
| IE | 16. | Prepare a postclosing trial balance. |
| IIA | 17. | Analyze merchandising transactions into debit and credit parts. |
| IIA | 18. | Journalize transactions for a merchandising business. |
| IIA | 19. | Post from a combination journal to a general ledger, an accounts receivable ledger, and an accounts payable ledger. |
| IIA | 20. | Prepare a schedule of accounts receivable and a schedule of accounts payable. |
| IIB | 21. | Endorse checks. |
| IIB | 22. | Prepare a deposit slip. |

## COMPETENCIES – ACCOUNTING I

| | | |
|---|---|---|
| IIB | 23. | Write checks. |
| IIB | 24. | Reconcile a bank statement and record the entry for a service charge. |
| IIC | 25. | Complete a worksheet with adjustments. |
| IIC | 26. | Prepare financial statements for a merchandising business. |
| IIC | 27. | Journalize adjusting and closing entries. |
| IIC | 28. | Prepare a postclosing trial balance. |
| IIIA | 29. | Prepare a chart of accounts; set up form for a general ledger and for subsidiary ledgers. |
| IIIA | 30. | Add new accounts to the general ledger chart of accounts and to the subsidiary ledger chart of accounts. |
| IIIA | 31. | Record an opening entry for an automated accounting system. |
| IIIB | 32. | Journalize daily and the end-of-fiscal-period work transactions in an automated accounting system. |
| IVA | 33. | Complete payroll time cards. |
| IVA | 34. | Prepare a payroll register. |
| IVA | 35. | Prepare an employee's record of earnings. |
| IVB | 36. | Record and post payroll transactions. |
| VA-B | 37. | Complete the accounting cycle using special journals. |
| VC | 38. | Replenish petty cash. |
| VC | 39. | Record transactions in a cash register system. |
| VIA | 40. | Record special transactions affecting sales. |
| VIA | 41. | Use source documents as journals and ledgers. |
| VIB | 42. | Record transactions affecting uncollectible accounts. |
| VIC | 43. | Figure straight-line depreciation and book value; record the adjusting entry for depreciation expense. |
| VIC | 44. | Figure gain or loss on plant assets. |
| VIC | 45. | Record entries to dispose and sell plant assets. |

## COMPETENCIES – ACCOUNTING I

VID 46. Compute maturity dates and interest on notes receivable.

VID 47. Compute bank discounts and proceeds on notes payable.

VID 48. Record notes, interest, and bank discounts.

VIE 49. Adjust, close, and reverse entries for accrued revenue and expenses.

VIIA 50. Record opening entries for a partnership.

VIIA 51. Distribute the net income of a partnership.

VIIA 52. Complete the end-of-fiscal-period work for a partnership.

VIIB 53. Journalize the opening entry for a corporation.

VIIB 54. Record entries to declare and pay a dividend.

VIIB 55. Complete the end-of-fiscal-period work for a corporation.

## OBJECTIVES – ACCOUNTING I

I-VII 1. Given a list of accounting terms and a list of definitions, match each term with the correct definition.

IA 2. Given a list of accounts, accurately classify each account as to asset, liability, or capital.

IA 3. Given an accounting form and a list of assets and liabilities, compute the correct amount of capital and prepare a balance sheet in proper form.

IA 4. Given a completed balance sheet and a general journal page, correctly record the opening entry and post it to the general ledger in proper form.

IA 5. Given a list of ten account titles and numbers, arrange a chart of accounts in correct numerical order.

IB 6. Given ten transactions, use T-accounts to correctly analyze each transaction as to its debit and credit parts.

IC 7. Given a general journal page and five transactions, journalize each transaction correctly.

IC 8. Given a cash journal and ten transactions, correctly journalize each transaction.

IC 9. Given a general journal and general ledger, correctly post from the journal to ledger accounts.

IC 10. Given a completed cash journal and general ledger accounts correctly post from the journal to ledger accounts.

ID 11. Given a completed ledger, correctly prepare a trial balance.

IE 12. Given ledger account balances and analysis paper, correctly complete a six-column worksheet, prepare an income statement and a balance sheet, journalize and post the closing entries, and prepare a postclosing trial balance.

IIA 13. Given fifteen merchandising transactions, correctly analyze each into its debit and credit parts.

IIA 14. Given a combination journal, a general ledger, subsidiary ledgers, and a month's transactions, correctly journalize the transactions, total and rule the journal, and post to the general ledger and subsidiary ledger in the proper form.

IIA 15. Given completed subsidiary ledgers and accounting paper, prepare a schedule of accounts receivable and a schedule of accounts payable in the correct form.

## OBJECTIVES – ACCOUNTING I

IIB 16. Given four endorsed checks, correctly identify the blank, restrictive, specialized, and qualified endorsement.

IIB 17. Given a deposit slip, amount of money, and checks on hand, prepare a deposit in the proper form.

IIB 18. Given stubs, checks, amount to be deposited, and three transactions, correctly sign the checks and legibly record the deposit on the check stub.

IIB 19. Given a bank statement, cancelled checks, and completed check stubs for one month, correctly reconcile the bank statement.

IIC 20. Given a worksheet with adjustment data and accounting paper, correctly complete the end-of-fiscal-period work for a merchandising business.

IIA-C 21. Given a simulation for a merchandising business, correctly complete the accounting cycle transactions for one month.

IIIA 22. Given a chart of accounts for a general ledger, an accounts receivable and an accounts payable ledger, new accounts, and data processing set-up forms, correctly add new accounts to the general ledger, accounts receivable ledger, and accounts payable ledger chart of accounts.

IIIA 23. Given a journal entry transmittal, accounts, and account balances, correctly record an opening entry for an automated accounting system.

IIIB 24. Given a journal entry transmittal and a summary of daily transactions, correctly journalize the transactions.

IVA 25. Given time cards, a payroll register, and records of employees' earnings, correctly complete the time cards. Transfer the information to a payroll register and the employees' records accurately.

IVB 26. Given a completed payroll register, journal paper, and a ledger, correctly record and post the payroll transactions.

VA-B 27. Given special journals, business transactions for one month, ledgers, and end-of-month accounting paper, correctly complete the accounting cycle using special journals.

VC 28. Given a request to replenish petty cash, a check, and a cash payments journal, correctly prove petty cash, write a check to replenish petty cash, and record the entry in a cash payments journal in the proper form.

VC 29. Given a cash proof and balance slip, a cash receipts-sales journal, and a problem situation, correctly complete the cash proof and balances slip and record the data in the journal in the proper form.

# OBJECTIVES – ACCOUNTING I

VIA 30. Given special journals and selected sales transactions including sales tax, correctly journalize the transactions.

VIA 31. Given a set of sales invoices, use source documents as journals and subsidiary ledgers by correctly obtaining totals and journalizing the entry for the summary total and by preparing a schedule of accounts receivable in the proper form.

VIB 32. Given a general journal and ten transactions affecting uncollectible accounts, correctly journalize the transactions.

VIC 33. Given the cost of five pieces of equipment, date purchased, estimated salvage value, and estimated life, correctly figure the book value. Use the straight-line method to figure depreciation for two consecutive years, and record the journal entries for depreciation expense in the proper form.

VIC 34. Given journals and selected transactions, correctly record the entries to buy and dispose of plant assets.

VID 35. Given a cash receipts and cash payments journal and ten transactions, correctly analyze and journalize the entries affecting notes receivable and bank discounts.

VIE 36. Given selected accounts and balances, general ledger, general journal, and adjustment data, correctly journalize and post the entries to adjust, close, and reverse the accounts.

VIIA 37. Given information, a balance sheet, and/or cash investments, correctly record the opening entry for a partnership.

VIIA 38. Given data taken from records of a business, correctly prepare a distribution of net income for a partnership.

VIIA 39. Given necessary business forms and end-of-fiscal-period data, correctly complete the end-of-fiscal-period work for a partnership.

VIIB 40. Given a problem situation, a balance sheet, a general journal, and a cash receipts journal, correctly record the opening entry for a corporation and record the memorandum entry for a cash investment in the cash receipts journal.

VIIB 41. Given a general journal, cash payments journal, and three transactions, correctly journalize entries relating to the declaration of a dividend.

VIIB 42. Given necessary business forms and the end-of-fiscal-period data, correctly complete the end-of-fiscal-period work for a corporation.

## ACCOUNTING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| I-VII | Defines accounting terms associated with each topic. | | | |
| IA | Classifies accounts as to assets, liabilities, and capital. | | | |
| IA | Prepares a balance sheet. | | | |
| IA | Records the opening entry in the general journal. | | | |
| IA | Arranges a chart of accounts. | | | |
| IA | Opens accounts in a general ledger and posts the opening entry to the general ledger. | | | |
| IB | Analyzes business transactions into debit and credit parts using T-accounts. | | | |
| IC | Records business transactions in a general journal and a cash journal. | | | |
| IC | Posts from a general journal to a general ledger. | | | |
| IC | Posts from a cash journal to the ledger. | | | |
| ID | Prepares a trial balance. | | | |

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## ACCOUNTING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IE | Prepares a six-column worksheet. | | | |
| IE | Prepares an income statement. | | | |
| IE | Prepares a balance sheet. | | | |
| IE | Closes the ledger. | | | |
| IE | Prepares a postclosing trial balance. | | | |
| IIA | Analyzes merchandising transactions into debit and credit parts. | | | |
| IIA | Journalizes transactions for a merchandising business. | | | |
| IIA | Posts from a combination journal to a general ledger, an accounts receivable ledger and an accounts payable ledger. | | | |
| IIA | Prepares a schedule of accounts receivable and a schedule of accounts payable. | | | |
| IIB | Endorses checks. | | | |
| IIB | Prepares a deposit slip. | | | |

## ACCOUNTING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IIB | Writes checks. | | | |
| IIB | Reconciles a bank statement and records the entry for a service charge. | | | |
| IIC | Completes a worksheet with adjustments. | | | |
| IIC | Prepares financial statements for a merchandising business. | | | |
| IIC | Journalizes adjusting and closing entries. | | | |
| IIC | Prepares a postclosing trial balance. | | | |
| IIIA | Prepares a chart of accounts; sets up form for a general ledger and for subsidiary ledgers. | | | |
| IIIA | Adds new accounts to the general ledger chart of accounts and to the subsidiary ledger chart of accounts. | | | |
| IIIA | Records an opening entry for an automated accounting system. | | | |
| IIIB | Journalizes daily and the end-of-fiscal-period work transactions in an automated accounting system. | | | |
| IVA | Completes payroll time cards. | | | |

## ACCOUNTING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IVA | Prepares a payroll register. | | | |
| IVA | Prepares an employee's record of earnings. | | | |
| IVB | Records and posts payroll transactions. | | | |
| VA-B | Completes the accounting cycle using special journals. | | | |
| VC | Replenishes petty cash. | | | |
| VC | Records transactions in a cash register system. | | | |
| VIA | Records special transactions affecting sales. | | | |
| VIA | Uses source documents as journals and ledgers. | | | |
| VIB | Records transactions affecting uncollectible accounts. | | | |
| VIC | Figures straight-line depreciation and book value; records the adjustment entry for depreciation expense. | | | |
| VIC | Figures gain or loss on plant assets. | | | |

## ACCOUNTING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIC | Records entries to dispose and sell plant assets. | | | |
| VID | Computes maturity dates and interest on notes receivable. | | | |
| VID | Computes bank discounts and proceeds on notes payable. | | | |
| VID | Records notes, interest, and bank discounts. | | | |
| VIE | Adjusts, closes, and reverses entries for accrued revenue and expenses. | | | |
| VIIA | Records opening entries for a partnership. | | | |
| VIIA | Distributes the net income of a partnership. | | | |
| VIIA | Completes the end-of-fiscal-period work for a partnership. | | | |
| VIIB | Journalizes the opening entry for a corporation. | | | |
| VIIB | Records entries to declare and pay a dividend. | | | |
| VIIB | Completes the end-of-fiscal-period work for a corporation. | | | |

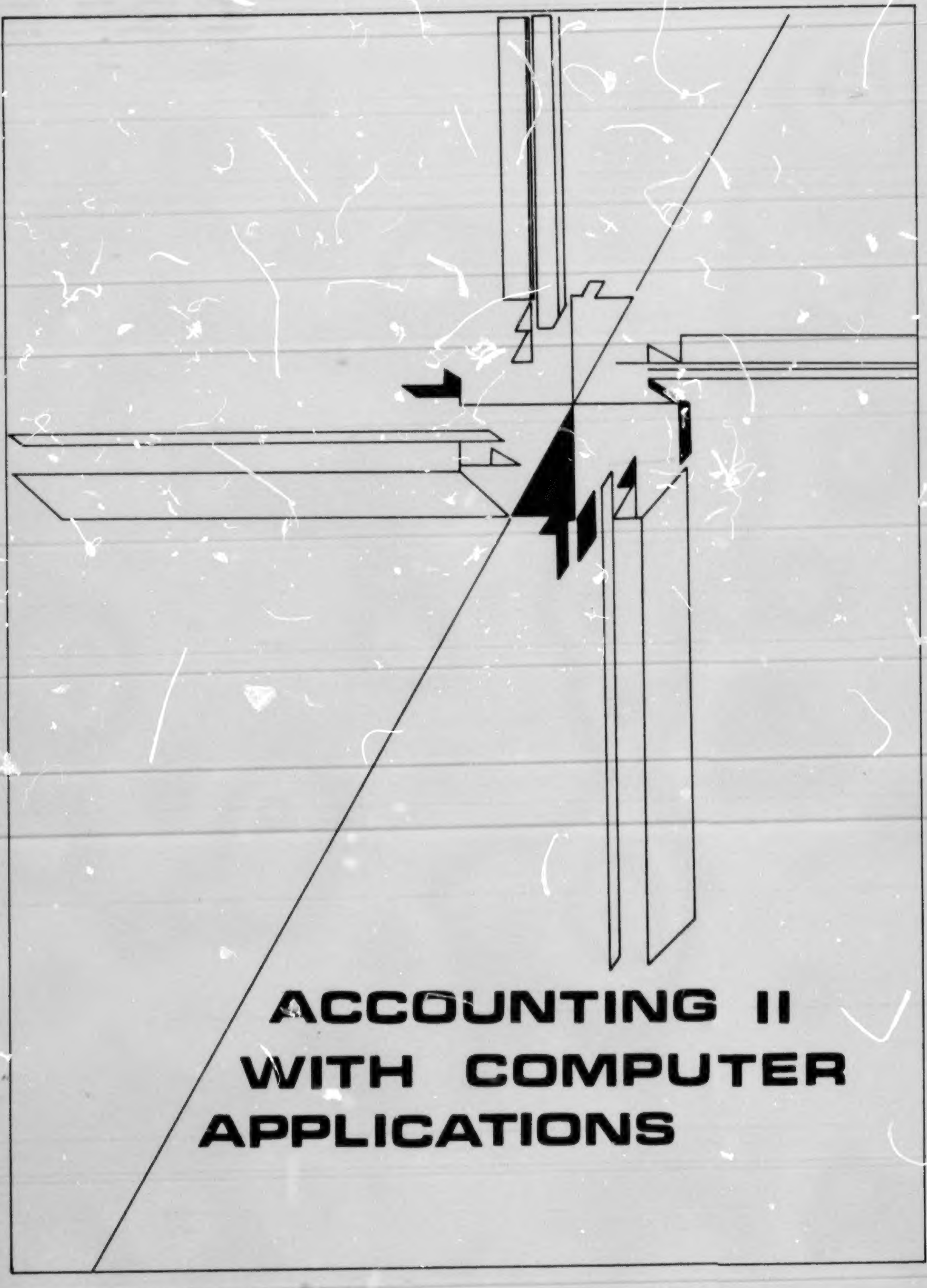
| PROFICIENCY RATING | |
|---|---|
| **Scale Value** | **Definition** |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

| | |
|---|---|
| Phase I | Grade ________ |
| Phase II | Grade ________ |
| | Final Grade ________ |



# ACCOUNTING II WITH COMPUTER APPLICATIONS

## ACCOUNTING II WITH COMPUTER APPLICATIONS

### Description

The basic principles and procedures learned in Accounting II are developed and expanded by the study of partnerships and departmental, corporate, automated, and cost accounting systems. A voucher system for accounting is introduced and used in departmental, corporate, and cost accounting. Aspects of accounting using accrual and cash basis are also examined. Students learn to analyze and interpret accounting data, to provide businesses with information, and to plan and control operations.

### Purpose

The purpose of this advanced accounting course is to provide the student with entry-level skills in the accounting profession and/or to develop a foundation for postsecondary study.

## COURSE OUTLINE -- ACCOUNTING II WITH COMPUTER APPLICATIONS

I. Careers in the Accounting Profession

- A. Identifying areas of employment
- B. Analyzing classified ads for qualifications

II. Review of Basic Accounting Principles and Procedures

- A. Journalizing, posting, and preparing a trial balance
- B. Completing the end-of-fiscal-period work

III. Accounting Procedures for a Partnership

- A. Forming a partnership
- B. Dividing partnership earnings
- C. Completing the end-of-fiscal-period work

IV. Specialized Accounting Clerks

- A. Journalizing and posting departmental purchases and cash payments
- B. Journalizing and posting departmental sales and cash receipts
- C. Accounting for inventory control
- D. Preparing a payroll
- E. Using a voucher system

V. Automated Accounting

- A. Recording and controlling daily transactions involving purchases and cash payments
- B. Recording and controlling daily transactions involving sales and cash receipts
- C. Recording and controlling general transactions
- D. Processing daily transactions
- E. Completing the end-of-fiscal-period work

VI. Corporation Accounting

- A. Forming a corporation
- B. Acquiring capital for a corporation
- C. Analyzing financial statements and reporting equity of a corporation

VII. Cost Accounting

- A. Completing the end-of-fiscal-period work for a departmental merchandising business
- B. Accounting for the costs of manufacturing a product
- C. Completing the end-of-fiscal-period work for a manufacturing business

VIII. Accounting on an Accrual Basis and on a Cash Basis

- A. Recording uncollectible accounts
- B. Recording plant assets
- C. Recording prepaid and accrued items
- D. Preparing financial statements on a cash basis

## COURSE OUTLINE – ACCOUNTING II WITH COMPUTER APPLICATIONS

IX. Analyzing and Interpreting Accounting Data

A. Planning and controlling budget
B. Accounting information for management decisions
C. Analyzing financial statements
D. Preparing a statement of changes in financial position

## COMPETENCIES – ACCOUNTING II WITH COMPUTER APPLICATIONS

The student is required to demonstrate the following competencies in order to complete successfully Accounting II.

| | | |
|---|---|---|
| IA | 1. | Identify duties related to accounting positions. |
| iB | 2. | Analyze classified want ads as to entry-level or advancement-level jobs and minimum level of education. |
| IIA-B | 3. | Complete the accounting cycle for a merchandising business. |
| IIIA | 4. | Make opening entries for a partnership. |
| IIIA | 5. | Make entries to show the admission of a new partner. |
| IIIB | 6. | Make entries to distribute assets when a partnership is terminated. |
| IIIB | 7. | Prepare a distribution of net income statement. |
| IIIB | 8. | Record entries to distribute net income or loss. |
| IIIC | 9. | Complete the end-of-fiscal-period work for a partnership. |
| IVA | 10. | Record and post transactions related to departmental purchases and cash payments. |
| IVA | 11. | Reconcile a bank statement. |
| IVB | 12. | Record and post transactions related to departmental sales and cash receipts. |
| IVC | 13. | Determine the value of inventories using fifo, lifo, and lower-of-cost or market method. |
| IVC | 14. | Prepare an interim statement of gross profit. |
| IVD | 15. | Prepare a payroll register. |
| IVD | 16. | Prepare an employee's record of earnings. |
| IVE | 17. | Record transactions in a voucher register and check register. |
| VA | 18. | Add new accounts to the general ledger chart of accounts and the subsidiary ledger chart of accounts. |
| VA-C | 19. | Record purchases, cash payments, sales, cash receipts, and general transactions for an automated accounting system. |
| VA-C | 20. | Prepare a batch control sheet for purchases and cash payments, sales and cash receipts, and general transactions. |

## COMPETENCIES – ACCOUNTING II WITH COMPUTER APPLICATIONS

VA-C 21. Prepare an accounts receivable and an accounts payable control sheet.

VD 22. Record adjusting and closing entries for an automated accounting system.

VIA 23. Record investments to establish a corporation.

VIA 24. Calculate dividends of a corporation.

VIA 25. Show the distribution of net income or loss.

VIB 26. Record journal entries for issuing additional capital stock and for buying and selling treasury stock.

VIB 27. Record journal entries for issuing and retiring bonds payable.

VIC 28. Complete the end-of-fiscal-period work for a corporation.

VIC 29. Figure the amounts and record the journal entries for a declaration and payment of corporation dividends.

VIC 30. Determine the equity per share, the earnings per share, the market value per share, and the price earnings ratio of a corporation.

VIIA 31. Complete a worksheet and the end-of-fiscal-period statements for a departmentalized merchandising business.

VIIB 32. Prepare a cost sheet for a manufacturing business.

VIIB 33. Record entries in a materials ledger.

VIIC 34. Complete a voucher register for a manufacturing business.

VIIC 35. Journalize and post entries to summarize cost records at the end of month for a manufacturing business.

VIIIA 36. Write off uncollectible accounts using the direct write-off method.

VIIIA 37. Estimate bad debts by aging accounts receivable.

VIIIA 38. Journalize transactions affecting allowance for uncollectible accounts.

VIIIB 39. Figure depreciation using three common methods – straight-line, declining-balance, and sum-of-years digits.

VIIIB 40. Record entries for depreciation expense and disposing of plant assets.

VIIIC 41. Record adjusting and reversing entries for prepaid and accrued items.

## COMPETENCIES – ACCOUNTING II WITH COMPUTER APPLICATIONS

| | | |
|---|---|---|
| VIIIC | 42. | Complete the end-of-fiscal-period work including prepaid and accrued items. |
| VIIID | 43. | Record transactions and prepare financial statements on a cash basis. |
| IXA | 44. | Prepare a sales budget schedule and a purchase budget schedule. |
| IXA | 45. | Prepare a budgeted income statement. |
| IXA | 46. | Prepare a cash budget. |
| IXB | 47. | Figure the contribution margin, the contribution margin rate, and the breakeven point. |
| IXB | 48. | Figure increase in unit selling price, unit variable costs, and total fixed costs. |
| IXC | 49. | Prepare and analyze comparative financial statements. |
| IXD | 50. | Prepare a statement of changes in financial position. |
| IXD | 51. | Prepare a schedule of changes in working capital. |
| I-IX | 52. | Define terms associated with each accounting topic. |

## OBJECTIVES – ACCOUNTING II WITH COMPUTER APPLICATIONS

| | | |
|---|---|---|
| IA | 1. | Given a list of duties, correctly identify the related accounting position. |
| IB | 2. | Given a set of classified ads, correctly list the entry-level accounting position and minimum education. |
| IIA-B | 3. | Given a set of special journals, business papers, and a month's transactions, correctly complete the accounting cycle for a merchandising business. |
| IIIA | 4. | Given a general journal and necessary data, correctly journalize the opening entry for a new partnership. |
| IIIA | 5. | Given a general journal and instructions for admitting a new partner, correctly journalize the transaction. |
| IIIB | 6. | Given a general journal and a problem situation, correctly journalize the transaction required to distribute assets when a partnership is terminated. |
| IIIB | 7. | Given business papers and necessary data, accurately complete a distribution of net income statement. |
| IIIB | 8. | Given a completed distribution of net income statement, correctly record the entry to close the income summary account and distribute the net income or loss to the partner's capital account. |
| IIIC | 9. | Given a worksheet with a completed trial balance, business papers, and data for adjusting entries and division of partnership earnings, correctly complete the end-of-fiscal-period work for a partnership. |
| IVA | 10. | Given transactions relating to departmental purchases and cash payments, correctly journalize the entries; foot, prove and rule the journals; and post to the appropriate ledgers in the proper form. |
| IVA | 11. | Given check stubs, a bank statement, cancelled checks, and a reconciliation form, correctly reconcile the checkbook and bank balance. |
| IVB | 12. | Given transactions relating to departmental sales and cash receipts, correctly journalize the entries; foot, prove and rule the journals; and post to the appropriate ledger in the proper form. |
| IVC | 13. | Given an inventory sheet, correctly figure the inventory using the fifo, lifo, and lower-of-cost or market method. |
| IVC | 14. | Given appropriate data from accounting records, correctly prepare an interim statement of gross profit. |
| IVD | 15. | Given a list of employees and payroll information about each individual, accurately complete a payroll register. |

## OBJECTIVES – ACCOUNTING II WITH COMPUTER APPLICATIONS

IVD 16. Given employee payroll data, accurately complete an employee's quarterly record of earnings.

IVE 17. Given a voucher register, check register and business transactions, correctly journalize the entries and complete the registers.

VA 18. Given a general ledger chart of accounts and a list of account titles, correctly assign numbers to the new accounts.

VA 19. Given a subsidiary ledger chart of accounts and a list of names, correctly assign numbers to the new accounts.

VA-C 20. Given three journal entry transmittals and a set of transactions, correctly journalize the transactions for automated accounting.

VA-C 21. Given completed journal entry transmittals and batch control sheets, correctly complete batch controls for purchases and cash payments, sales and cash receipts, and general transactions.

VA-C 22. Given completed journal entry transmittals and control sheets, correctly complete an accounts payable and an accounts receivable control sheet.

VD 23. Given two journal entry transmittals, two batch control sheets, and data for adjustments, correctly journalize adjusting entries and complete a batch control sheet, and record the closing entries and complete a batch control sheet in proper form.

VIA 24. Given selected transactions and appropriate journals, correctly record investments to establish a corporation.

VIA 25. Given dividends for several successive years, correctly calculate the dividends paid each year on preferred and/or common stock.

VIA 26. Given columnar paper, correctly distribute the net income or loss of a corporation.

VIB 27. Given a cash receipts and cash payments journal and selected transactions, correctly journalize entries for issuing additional capital stock and for buying and selling treasury stock.

VIB 28. Given a cash receipts and cash payments journal and a problem, correctly journalize entries for issuing and retiring bonds payable.

VIC 29. Given a worksheet with completed trial balance, data for adjusting entries, and business papers, correctly complete the end-of-fiscal-period work for a corporation.

VIC 30. Given a general journal and a cash payments journal, correctly record the journal entries for a declaration and payment of corporate dividends.

## OBJECTIVES – ACCOUNTING II WITH COMPUTER APPLICATIONS

VIC 31. Given financial reports, correctly figure equity per share, earnings per share, and price-earnings ratio.

VIC 32. Given a section of a financial page of a newspaper, accurately figure market value per share of stock.

VIIA 33. Given a 12-column worksheet, data for making adjustments, and business papers, correctly complete the worksheet and the end-of-fiscal-period statements for a departmentalized, merchandising business.

VIIA 34. Given a completed departmental margin statement, correctly figure the percentage of net sales for each item.

VIIB 35. Given a cost sheet and selected transactions, correctly prepare a cost sheet for a manufacturing business.

VIIB 36. Given a materials ledger sheet and a problem, prepare a materials ledger in the proper form.

VIIC 37. Given a voucher register and transactions, correctly record these transactions in a voucher register of a manufacturing business.

VIIC 38. Given necessary data, correctly journalize and post entries to summarize the cost records of a manufacturing firm.

VIIIA 39. Given a cash receipts and general journal and selected transactions, correctly journalize entries affecting uncollectible accounts by using the direct write-off method.

VIIIA 40. Given a list of accounts receivable by age, correctly figure and record in a general journal the adjustment for uncollectible accounts.

VIIIA 41. Given a list of selected transactions, correctly record the necessary entries affecting allowance for uncollectible accounts.

VIIIB 42. Given the cost price and salvage value of equipment, correctly figure depreciation using three common methods.

VIIIB 43. Given selected transactions, correctly record in the appropriate registers and journals entries for depreciation and the disposing of plant assets.

VIIIC 44. Given necessary data, correctly record in the general journal adjusting and reversing entries for prepaid and accrued items.

VIIIC 45. Given a worksheet, business papers, and adjustment data, accurately complete the worksheet and financial statements for a corporation.

VIIID 46. Given a summary report and selected transactions, correctly record the transactions in a daily journal and prepare financial statements on a cash basis.

## OBJECTIVES – ACCOUNTING II WITH COMPUTER APPLICATIONS

IXA 47. Given data and business forms, correctly prepare a sales budget schedule and a purchases budget schedule.

IXA 48. Given estimated sales, purchases, cash payments for expenses, and pertinent data, correctly prepare a cash budget.

IXA 49. Given estimated sales, cost of merchandise sold, percent, and expense percentages, prepare a budgeted income statement.

IXB 50. Given sales, variable costs, and fixed costs, correctly figure contribution margin, contribution margin rate, and the breakeven point in sales dollars and in units.

IXB 51. Given an income statement and percentage of expected changes in unit selling price, unit variable price, and total fixed costs, accurately prepare a new income statement.

IXC 52. Given data taken from financial statements, correctly prepare and analyze a comparative income statement and balance sheet.

IXD 53. Given a comparative balance sheet and pertinent data, correctly prepare a statement of changes in financial position.

IXD 54. Given a comparative balance sheet and additional data needed, correctly prepare a schedule of changes in working capital.

I-IX 55. Given a list of accounting terms and definitions, correctly match the term with its correct definition.

## ACCOUNTING II WITH COMPUTER APPLICATIONS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Identifies duties related to accounting positions. | | | |
| IB | Analyzes classified want ads as to entry-level or advancement-level jobs and minimum level of education. | | | |
| IIA-B | Completes the accounting cycle for a merchandising business. | | | |
| IIIA | Makes opening entries for a partnership. | | | |
| IIIA | Makes entries to show the admission of a new partner. | | | |
| IIIB | Makes entries to distribute assets when a partnership is terminated. | | | |
| IIIB | Prepares a distribution of net income statement. | | | |
| IIIB | Records entries to distribute net income or loss. | | | |
| IIIC | Completes the end-of-fiscal-period work for a partnership. | | | |
| IVA | Records and posts transactions related to departmental purchases and cash payments. | | | |
| IVA | Reconciles a bank statement. | | | |

# ACCOUNTING II WITH COMPUTER APPLICATIONS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IVB | Records and posts transactions related to departmental sales and cash receipts. | | | |
| IVC | Determines value of inventories using fifo, lifo, and lower-of-cost or market method. | | | |
| IVC | Prepares an interim statement of gross profit. | | | |
| IVD | Prepares a payroll register. | | | |
| IVD | Prepares an employee's record of earnings. | | | |
| IVE | Records transactions in a voucher register and check register. | | | |
| VA | Adds new accounts to the general ledger chart of accounts and the subsidiary ledger chart of accounts. | | | |
| VA-C | Records purchases, cash payments, sales, cash receipts, and general transactions for an automated accounting system. | | | |
| VA-C | Prepares a batch control sheet for purchases and cash payments, sales and cash receipts, and general transactions. | | | |
| VA-C | Prepares an accounts receivable and an accounts payable control sheet. | | | |
| VD | Records adjusting and closing entries for an automated accounting system. | | | |
| VIA | Records investments to establish a corporation. | | | |

## ACCOUNTING II WITH COMPUTER APPLICATIONS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIA | Calculates dividends of a corporation. | | | |
| VIA | Shows the distribution of net income or loss. | | | |
| VIB | Records journal entries for issuing additional capital stock and for buying and selling treasury stock. | | | |
| VIB | Records journal entries for issuing and retiring bonds payable. | | | |
| VIC | Completes the end-of-fiscal-period work for a corporation. | | | |
| VIC | Figures the amounts and records the journal entries for a declaration and payment of corporation dividends. | | | |
| VIC | Determines the equity per share, the earnings per share, the market value per share, and the price earnings ratio of a corporation. | | | |
| VIIA | Completes a worksheet and the end-of-fiscal-period statements for a departmentalized merchandising business. | | | |
| VIIB | Prepares a cost sheet for a manufacturing business. | | | |
| VIIB | Records entries in a materials ledger. | | | |
| VIIC | Completes a voucher register for a manufacturing business. | | | |

## ACCOUNTING II WITH COMPUTER APPLICATIONS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIIC | Journalizes and posts entries to summarize cost records at the end of month for a manufacturing business. | | | |
| VIIIA | Writes off uncollectible accounts using the direct write-off method. | | | |
| VIIIA | Estimates bad debts by aging accounts receivable. | | | |
| VIIIA | Journalizes transactions affecting allowance for uncollectible accounts. | | | |
| VIIIB | Figures depreciation using three common methods — straight-line, declining-balance, and sum-of-years digits. | | | |
| VIIIB | Records entries for depreciation expense and disposing of plant assets. | | | |
| VIIIC | Records adjusting and reversing entries for prepaid and accrued items. | | | |
| VIIIC | Completes the end-of-fiscal-period work including prepaid and accrued items. | | | |
| VIIID | Records transactions and prepares financial statements on a cash basis. | | | |
| IXA | Prepares a sales budget schedule and a purchase budget schedule. | | | |
| IXA | Prepares a budgeted income statement. | | | |

## ACCOUNTING II WITH COMPUTER APPLICATIONS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IXA | Prepares a cash budget. | | | |
| IXB | Figures the contribution margin, the contribution margin rate, and the breakeven point. | | | |
| IXB | Figures increase in unit selling price, unit variable costs, and total fixed costs. | | | |
| IXC | Prepares and analyzes comparative financial statements. | | | |
| IXD | Prepares a statement of changes in financial position. | | | |
| IXD | Prepares a schedule of changes in working capital. | | | |
| I-IX | Defines terms associated with each accounting topic. | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| PROFICIENCY RATING | |
|---|---|
| Scale Value | Definition |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

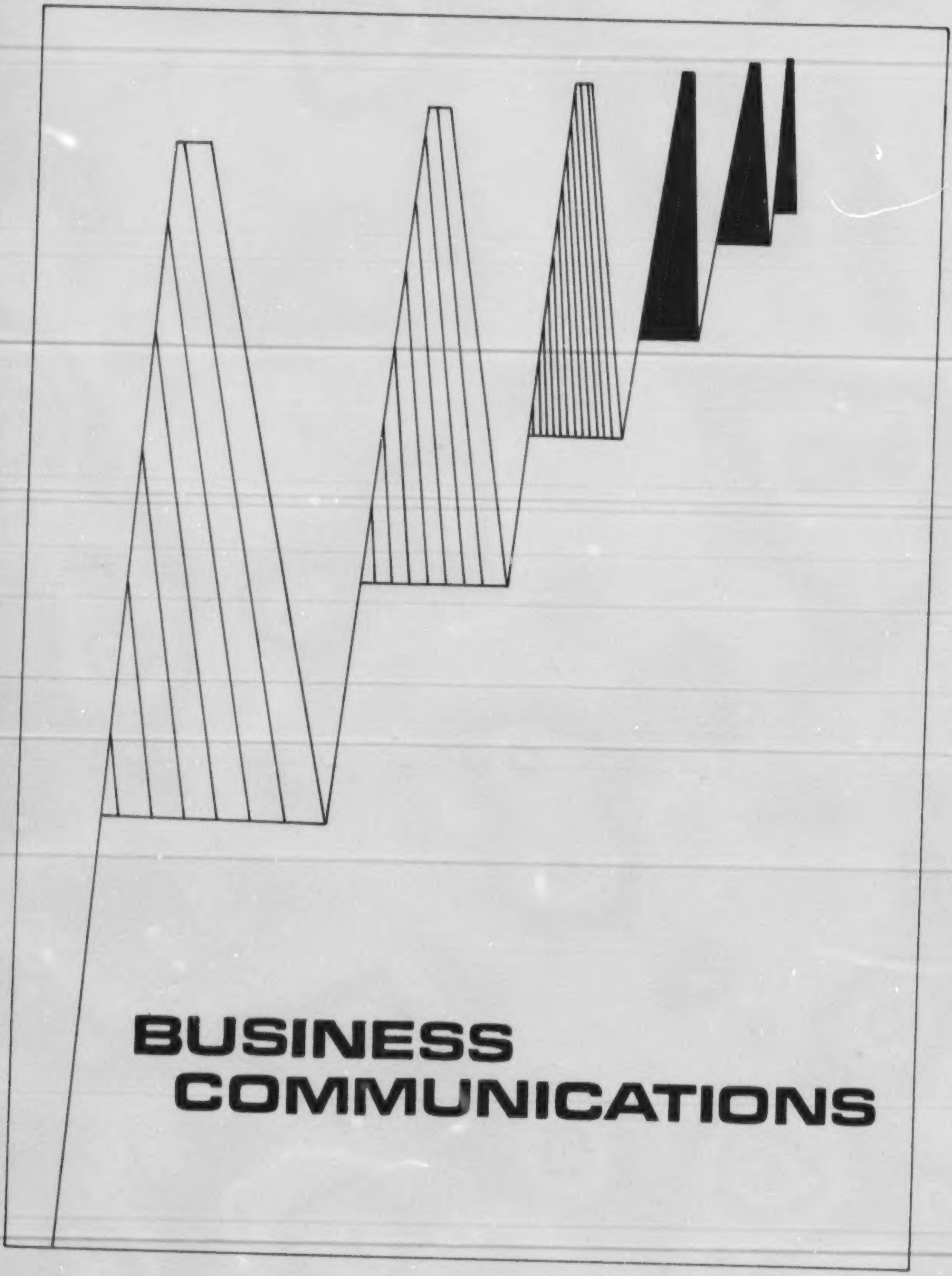
In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________



# BUSINESS COMMUNICATIONS

# BUSINESS COMMUNICATIONS

## Description

This course is designed to stress basic English as it relates to communications in the business world. It develops human relations skills in oral, written, and nonverbal means of contact.

## Purpose

The purpose of this course is to provide opportunities for students to learn the skills and knowledge needed for effective communication in the business world. Oral, written, and nonverbal communications, listening skills, and creative expression are considered essential tools for survival on the job and in the business world.

## COURSE OUTLINE – BUSINESS COMMUNICATIONS

I. Composition and Construction of Written Communications

- A. Improving vocabulary and spelling
  1. Vocabulary expansion – new words and definitions
  2. Mastery of spelling words commonly used in business
- B. Planning for written communication
  1. Sentence structure
  2. Paragraph unity, coherence, organization
- C. Utilizing word references
  1. Precision in choosing words
  2. Proper use of a dictionary, thesaurus, telephone directory, *Readers' Guide to Periodical Literature,* reference manuals, word division guides
- D. Applying the psychology of communication
  1. The *YOU* attitude
  2. Consideration for the reader
  3. Importance of the first and last paragraphs of a message
  4. Proper writing etiquette
- E. Writing business messages and letters
  1. Structural parts of a letter
  2. Appearance and content
  3. Styles of letters
  4. Interoffice memoranda
  5. Inquiry and request letters
  6. Goodwill messages
  7. Employment letters
  8. Claim and adjustment letters
  9. Credit and collection letters
  10. Sales and promotion letters
- F. Completing the job application
  1. Personal data sheet or resume
  2. Composition of the letter
  3. Completion of the application form
- G. Relating other materials to business writing
  1. Development of outlines
  2. Reports and manuscripts
  3. Organization of the bibliography
  4. Preparation of minutes of a business meeting

II. Effective Oral Communication Skills

- A. Developing effective speaking habits
  1. Organization of thoughts
  2. Quality speech patterns
  3. Enunciation and pronunciation of words
  4. Business conversations
  5. Proper procedures and conduct for a job interview
  6. Extemporaneous speeches

B. Personalizing communications
    1. Body language – posture, facial expression, gestures
    2. Positive behavior, appearance, attitude
    3. Ability to listen and interpret messages
C. Communicating over the telephone
    1. Proper telephone techniques
    2. Voice quality
    3. Speech patterns
    4. Telephone personality
D. Communicating on the job
    1. Effective human relations
    2. Ability to communicate ideas effectively
    3. Solving communication problems
    4. Self-analysis of communicating effectively

## COMPETENCIES – BUSINESS COMMUNICATIONS

The student is required to demonstrate the following competencies in order to complete successfully Business Communications.

IA 1. Define and spell correctly a list of business words.

IB 2. Arrange sentences in logical sequence for developing paragraphs that are free of grammatical, punctuation, spelling, and capitalization errors.

IC 3. Use the dictionary and the thesaurus to correct out-of-context words.

IC 4. Write sentences that show precision in choosing words for context.

IC 5. Locate assigned information in a telephone directory and in a city directory.

IC 6. Demonstrate proper use of the *Readers' Guide to Periodical Literature,* reference manuals, and word division guides.

ID 7. Complete a set of tasks designed to apply the psychology of communication.

IE 8. Identify the structural parts of a business letter.

IE 9. Write letters in selected styles.

IE 10. Compose short memoranda using correct grammar, punctuation, spelling, and capitalization.

IE 11. Respond to letters of inquiry and provide information requested.

IE 12. Compose messages of goodwill using correct grammar, punctuation, spelling, and capitalization.

IE 13. Compose letters of employment, claim and adjustment, credit and collection, and sales and promotion using specified psychological techniques of communication.

IF 14. Compose a personal data sheet or resume according to a specified format.

IF 15. Compose a letter of application for a specified position using correct grammar, punctuation, spelling, and capitalization.

IF 16. Complete an application form for a specified position using a paragraph of biographical data.

IG 17. Compose a topic outline for an original report or manuscript on a specified topic.

## COMPETENCIES – BUSINESS COMMUNICATIONS

IG 18. Compose a report or manuscript using a specified outline, proper reference materials, and correct grammar, punctuation, spelling, and capitalization.

IG 19. Develop a bibliography from a specified original report or manuscript using correct format.

IG 20. Write, edit, and revise minutes of a meeting in a classroom situation using correct format.

IIA 21. Demonstrate the ability to engage in a business conversation during a classroom situation.

IIA 22. Demonstrate specified procedures and conduct during a job interview situation.

IIB 23. Display effective body language, positive behavior, neat appearance, and a positive attitude during a three-minute classroom presentation.

IIB 24. Complete a set of tasks designed to test the ability to listen and to interpret.

IIC 25. Demonstrate through role playing the qualities of good human relations as specified on an evaluation checklist.

IIC 26. Complete case studies designed to test the ability to solve communication problems effectively in an office situation.

IIC 27. Complete a self-analysis checklist designed to rate knowledge of effective communication on the job.

## OBJECTIVES – BUSINESS COMMUNICATIONS

IA 1. Given a list of commonly misspelled business words, correct the spelling and define each word with 100% accuracy.

IB 2. Given a copy of several sentences that are grammatically incorrect and out of sequence for paragraph structure, arrange the sentences in a logical paragraph form and correct all errors.

IC 3. Given a paragraph with underlined out-of-context words, use the dictionary and the thesaurus to correct the underlined words.

IC 4. Given a set of incomplete sentences and a list of nouns, verbs, adjectives, and adverbs, complete each sentence using the correct words for proper context.

IC 5. Given case situations requiring information from a telephone directory and a city directory, locate the assigned information accurately.

IC 6. Given *Readers' Guide to Periodical Literature,* reference manuals, word division guides, and a set of tasks using reference materials, complete the test with 100% accuracy.

ID 7. Given a set of tasks designed to test the psychology of communication, complete the required tasks with 100% accuracy.

IE 8. Given a business letter, identify each structural part of the letter with 100% accuracy.

IE 9. Given a letter in unarranged form and a copy of instructions, write the letter in several acceptable styles with 100% accuracy.

IE 10. Given information necessary for composing a short memorandum, compose the memorandum using correct grammar, punctuation, spelling, and capitalization.

IE 11. Given a letter of inquiry and request, compose a response to the letter supplying all information requested with 100% accuracy.

IE 12. Given information necessary for composing messages of goodwill, compose the messages using correct grammar, punctuation, spelling, and capitalization.

IE 13. Given copies of poorly written letters of employment, claim and adjustment, credit and collection, and sales and promotion, rewrite the letters correctly using acceptable psychological techniques.

IF 14. Given specified biographical data, compose a personal data sheet or resume using correct information and an appropriate format.

## OBJECTIVES – BUSINESS COMMUNICATIONS

IF 15. Given typewritten information concerning a specified job or position, compose a letter of application for the position using correct grammar, punctuation, spelling, and capitalization.

IF 16. Given a paragraph of biographical data and a job application form, complete the job application form with 100% accuracy.

IG 17. Given a specified topic for a manuscript or report, compose a correct outline in preparation for researching and writing a manuscript or report.

IG 18. Given proper reference materials and instructions for writing a manuscript or report on a specified topic, compose a manuscript or report using correct format, grammar, punctuation, spelling, and capitalization.

IG 19. Given an original manuscript or report, develop a bibliography for the manuscript or report using correct format.

IG 20. Given a classroom situation depicting a business meeting, develop minutes of the meeting using correct format with accurate content.

IIA 21. Given classroom situations requiring oral communication skills for effective business conversations, make the appropriate responses.

IIA 22. Given a role-playing situation and a checklist of proper procedures and conduct for a job interview, complete each task on the checklist with 100% accuracy.

IIB 23. Given a three-minute time limit, a topic and a topic outline, and a checklist, give a grammatically correct oral presentation displaying proper body language and gestures as specified on the checklist.

IIB 24. Given a taped conversation and a set of questions designed to test the ability to listen and to interpret messages, complete the questions with 100% accuracy.

IIC 25. Given a role-playing situation and a checklist, display proper human relations as specified on the evaluation checklist with 100% accuracy.

IIC 26. Given case studies designed to test the ability to solve communication problems in an office situation effectively, respond appropriately.

IIC 27. Given a self-analysis checklist designed to rate knowledge of effective communication on the job, objectively complete the checklist and evaluate weak areas.

## BUSINESS COMMUNICATIONS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Defines and spells correctly a list of business words. | | | |
| IB | Arranges sentences in logical sequence for developing paragraphs that are free of grammatical, punctuation, spelling, and capitalization errors. | | | |
| IC | Uses the dictionary and the thesaurus to correct out-of-context words. | | | |
| IC | Writes sentences that show precision in choosing words for context. | | | |
| IC | Locates assigned information in a telephone directory and in a city directory. | | | |
| IC | Demonstrates proper use of the *Readers' Guide to Periodical Literature,* reference manuals, and word division guides. | | | |
| ID | Completes a set of tasks designed to test knowledge of the psychology of communication. | | | |
| IE | Identifies the structural parts of a business letter. | | | |
| IE | Writes letters in selected styles. | | | |
| IE | Composes short memoranda using correct grammar, punctuation, spelling, and capitalization. | | | |
| IE | Responds to letters of inquiry and provides information requested. | | | |

# BUSINESS COMMUNICATIONS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IE | Composes messages of goodwill using correct grammar, punctuation, spelling, and capitalization. | | | |
| IE | Composes letters of employment, claim and adjustment, credit and collection, and sales and promotion using specified psychological techniques of communication. | | | |
| IF | Composes a personal data sheet or resume according to a specified format. | | | |
| IF | Composes a letter of application for a specified position using correct grammar, punctuation, spelling, and capitalization. | | | |
| IF | Completes an application form for a specified position using a paragraph of biographical data. | | | |
| IG | Composes a topic outline for an original report or manuscript on a specified topic. | | | |
| IG | Composes a report or manuscript using a specified outline, proper reference materials, and correct grammar, punctuation, spelling, and capitalization. | | | |
| IG | Develops a bibliography from a specified original report or manuscript using correct format. | | | |
| IG | Writes, edits, and revises minutes of a meeting in a classroom situation using correct format. | | | |
| IIA | Demonstrates the ability to engage in a business conversation during a classroom situation. | | | |
| IIA | Demonstrates specified procedures and conduct during a job interview situation. | | | |

## BUSINESS COMMUNICATIONS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IIB | Displays effective body language, positive behavior, neat appearance, and a positive attitude during a three-minute classroom presentation. | | | |
| IIB | Completes a set of tasks designed to test the ability to listen and to interpret messages accurately. | | | |
| IIC | Demonstrates through role playing the qualities of good human relations as specified on an evaluation checklist. | | | |
| IIC | Completes case studies designed to test the ability to solve communication problems effectively in an office situation. | | | |
| IIC | Completes a self-analysis checklist designed to rate knowledge of effective communication on the job. | | | |
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| | | | | |

| PROFICIENCY RATING | |
|---|---|
| **Scale Value** | **Definition** |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

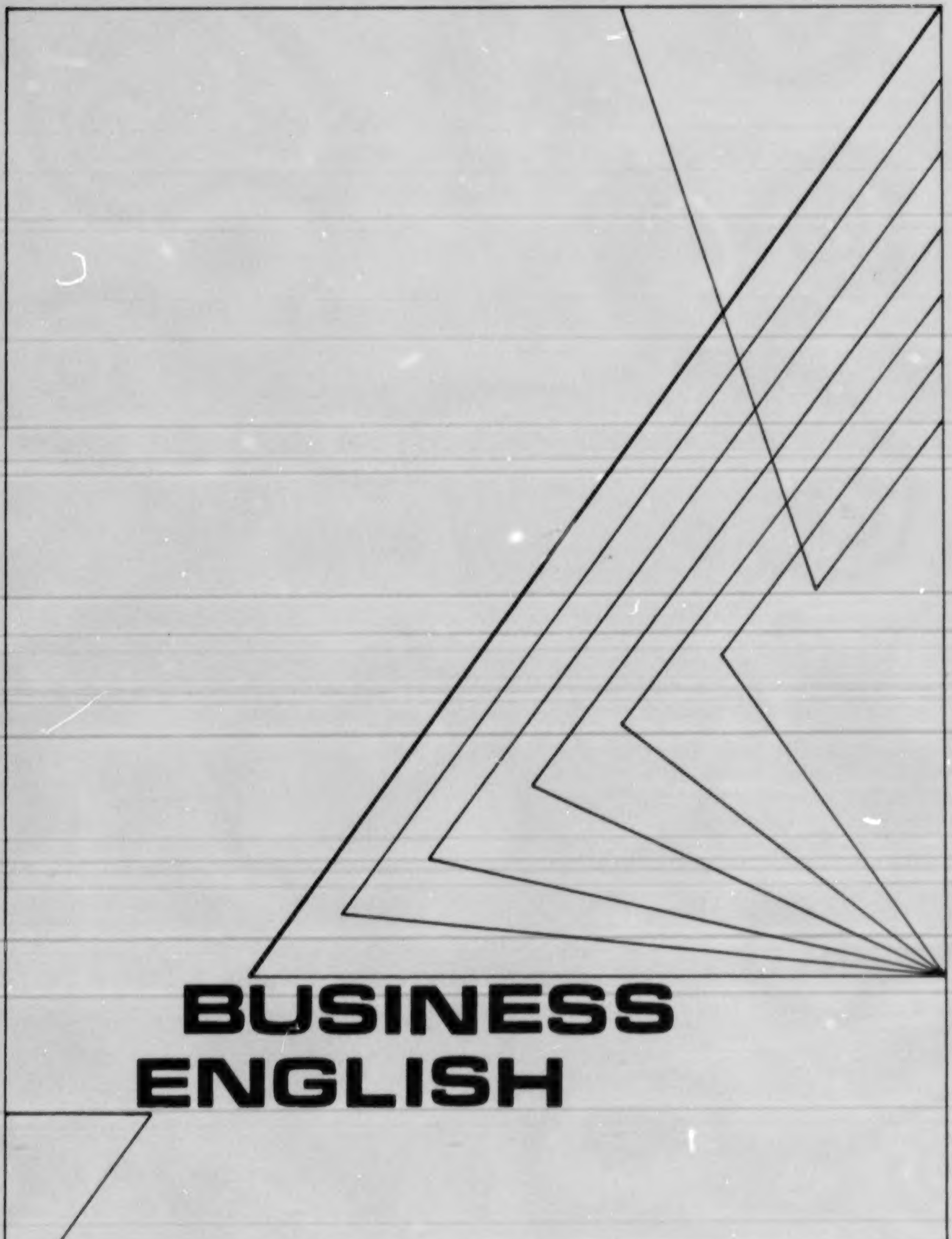
In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________



# BUSINESS ENGLISH

## BUSINESS ENGLISH

### Description

This course is designed to develop an understanding of basic language skills in written and oral communications. Constant emphasis is placed on the applicability of the learning to the student's career objective.

### Purpose

The purpose of this course is to develop basic skills in the use of correct sentence structure, punctuation, grammar, capitalization, and spelling in written and oral expression. Vocabulary improvement is a major goal of the course. Efficiency in the writing of a variety of business documents, letters, and reports with a critical analysis of each of these applications is the essential purpose of this course. These skills are necessary for job survival.

## COURSE OUTLINE – BUSINESS ENGLISH

I. Basic Language Skills and Grammar Review

  A. Reviewing the classification of parts of speech
    1. Nouns, verbs, pronouns, adjectives, adverbs, prepositions, conjunctions
  B. Mastering sentence structure
    1. Grammatical construction – simple, complex, compound, compound-complex
    2. Sentence purpose – declarative, interrogative, imperative, exclamatory
  C. Utilizing punctuation marks
    1. Internal punctuation – comma, semicolon, dash, parentheses, brackets, quotation marks, hyphen, apostrophe, omission marks
    2. End punctuation – period, question mark, exclamation mark
  D. Abbreviating, capitalizing, expressing numbers
    1. Abbreviation of titles, firm names, geographical names, government agencies, academic degrees, associations
    2. Capitalization of proper nouns, publications, titles, organizations, calendar terms, historical periods
    3. Numbers written as words and numbers written as figures
  E. Developing competence in paragraph structure
    1. Paragraph unity, coherence, and organization
    2. Writing and editing paragraphs
  F. Improving vocabulary and spelling
    1. Vocabulary expansion – new words and definitions
    2. Mastery of spelling words commonly used in business
  G. Utilizing word references
    1. Precision in choosing words
    2. Proper use of the dictionary, thesaurus, telephone directory, *Readers' Guide to Periodical Literature,* reference manuals, word division guides

II. Composition and Construction of Written Communications

  A. Planning for written communication
    1. Sentence structure review
    2. Paragraph unity, coherence, organization review
  B. Applying the psychology of communication
    1. The *YOU* attitude
    2. Consideration for the reader
    3. Importance of the first and last paragraphs of a message
    4. Proper writing etiquette
  C. Writing business messages and letters
    1. Structural parts of a letter
    2. Appearance and content
    3. Styles of letters
    4. Interoffice correspondence
    5. Inquiry and request letters
    6. Goodwill messages
    7. Employment letters
    8. Claim and adjustment letters
    9. Credit and collection letters
    10. Sales and promotion letters

- D. Completing the job application
    - 1. Personal data sheet or resume
    - 2. Composition of the letter
    - 3. Completion of the application form
- E. Relating other materials to business writing
    - 1. Development of outlines
    - 2. Reports and manuscripts
    - 3. Organization of the bibliography
    - 4. Preparation of minutes of a business meeting

III. Effective Oral Communication Skills

- A. Developing effective speaking habits
    - 1. Organization of thoughts
    - 2. Quality speech patterns
    - 3. Enunciation and pronunciation of words
    - 4. Business conversations
    - 5. Proper procedures and conduct for a job interview
    - 6. Informal and formal speeches
- B. Personalizing communications
    - 1. Body language – posture, facial expression, gestures
    - 2. Positive behavior, appearance, attitude
    - 3. Ability to listen and to interpret messages
- C. Communicating on the job
    - 1. Effective human relations
    - 2. Solving communication problems
    - 3. Self-analysis of communicating effectively

## COMPETENCIES – BUSINESS ENGLISH

The student is required to demonstrate the following competencies in order to complete successfully Business English.

IA 1. Identify seven parts of speech.

IB 2. Compose four types of sentences according to grammatical construction.

IB 3. Compose four types of sentences that imply purpose.

IC 4. Punctuate sentences correctly using internal punctuation marks.

IC 5. Identify marks of end punctuation.

ID 6. List abbreviations for states, titles, firm names, geographical names, government agencies, academic degrees, and associations.

ID 7. Indicate proper capitalization for proper names, publications, titles, organizations, calendar terms, and historical periods.

ID 8. Express numbers correctly in figures and words.

IE 9. Arrange sentences in logical sequence for developing paragraphs.

IE 10. Edit and rewrite paragraphs correctly.

IF 11. Define and spell correctly a list of business words.

IG 12. Write sentences that show precision in choosing words for context.

IG 13. Use the dictionary and the thesaurus to correct inappropriate words.

IG 14. Locate assigned information in a telephone directory and in a city directory.

IG 15. Demonstrate proper use of *Readers' Guide to Periodical Literature,* reference manuals, and word division guides.

IIA 16. Identify grammatical, spelling, and punctuation errors in sentences and paragraphs.

IIB 17. Complete a set of tasks designed to test knowledge on the psychology of communication.

IIC 18. Identify the structural parts of a business letter.

IIC 19. Write letters in selected styles.

IIC 20. Compose a short memorandum using correct grammar, punctuation, spelling, and capitalization.

## COMPETENCIES – BUSINESS ENGLISH

IIC 21. Respond to letters of inquiry and provide information requested.

IIC 22. Compose messages of goodwill using correct grammar, punctuation, spelling, and capitalization.

IIC 23. Compose letters of employment, claim and adjustment, credit and collection, and sales and promotion using specified psychological techniques of communication.

IID 24. Compose a personal data sheet or resume according to a specified format.

IID 25. Compose a letter of application for a specified position using correct grammar, punctuation, spelling, and capitalization.

IID 26. Complete an application form for a specified position using a paragraph of biographical data.

IIE 27. Compose a topic outline for an original report or manuscript on a specified topic.

IIE 28. Compose a report or manuscript using a specified outline, proper reference materials, and correct grammar, punctuation, spelling, and capitalization.

IIE 29. Develop a bibliography from a specified original report or manuscript using correct format.

IIE 30. Write, edit, and revise minutes of a meeting in a classroom situation using correct format.

IIIA 31. Demonstrate the ability to engage in a business conversation during a classroom situation.

IIIA 32. Demonstrate specified procedures and conduct during a job interview situation.

IIIB 33. Display effective body language, positive behavior, neat appearance, and a positive attitude during a three-minute classroom presentation.

IIIB 34. Complete a set of tasks designed to test the ability to listen and to interpret messages accurately.

IIIC 35. Demonstrate through role playing the qualities of good human relations as specified on an evaluation checklist.

IIIC 36. Complete case studies designed to test the ability to solve communication problems effectively in an office situation.

## COMPETENCIES – BUSINESS ENGLISH

IIIC 37. Complete a self-analysis checklist designed to rate knowledge of effective communication on the job.

## OBJECTIVES – BUSINESS ENGLISH

IA 1. Given grammatically correct sentences, identify the parts of speech of the underlined words in each sentence with 100% accuracy.

IB 2. Given definitions of the four types of grammatical sentences, compose grammatically correct sentences for each type.

IB 3. Given definitions of the four types of sentences that imply purpose, compose sentences for each type with 100% accuracy.

IC 4. Given sentence material with internal punctuation marks omitted, insert correct internal marks of punctuation.

IC 5. Given sentences requiring end punctuation, complete each sentence by inserting correct end punctuation marks.

ID 6. Given a list of items that can be abbreviated such as states, titles, firm names, geographical names, government agencies, academic degrees, and associations, abbreviate each item with 100% accuracy.

ID 7. Given a list of words and phrases, capitalize the items requiring capitalization with 100% accuracy.

ID 8. Given a copy of sentences containing incorrect number expression, write each sentence correctly observing rules of number expression.

IE 9. Given unarranged copy of several sentences, arrange sentences in logical paragraph form.

IE 10. Given a rough-draft copy of several paragraphs, edit and rewrite each paragraph using correct grammatical skills, punctuation, spelling, and capitalization.

IF 11. Given a list of misspelled business words, correct the spelling and define each word with 100% accuracy.

IG 12. Given a set of incomplete sentences and a list of nouns, verbs, adjectives, and adverbs, complete each sentence using the correct words for proper context.

IG 13. Given a typewritten paragraph with underlined out-of-context words, use the dictionary and the thesaurus to correct the underlined words.

IG 14. Given case situations requiring information from a telephone directory and a city directory, locate assigned information accurately.

IG 15. Given *Readers' Guide to Periodical Literature,* reference manuals, word division guides, and a set of tasks using reference materials, complete the test with 100% accuracy.

## OBJECTIVES – BUSINESS ENGLISH

IIA 16. Given material containing several sentences that display incorrect grammar, punctuation, and spelling, rewrite each sentence correctly.

IIB 17. Given a set of tasks designed to test the psychology of communication, complete the tasks with 100% accuracy.

IIC 18. Given a typewritten business letter, identify each structural part of the letter with 100% accuracy.

IIC 19. Given a letter in unarranged form and a copy of instructions, write the letter in three acceptable styles with 100% accuracy.

IIC 20. Given information necessary for composing a short memorandum, compose the memorandum using correct grammar, punctuation, spelling and capitalization.

IIC 21. Given a letter of inquiry and request, compose a response to the letter supplying all information requested with 100% accuracy.

IIC 22. Given information necessary for composing messages of goodwill, compose the messages using correct grammar, punctuation, spelling, and capitalization.

IIC 23. Given copies of poorly written letters of employment, claim and adjustment, credit and collection, and sales and promotion, rewrite the letters correctly using acceptable psychological techniques.

IID 24. Given a specified format, compose a personal data sheet or resume using correct information and an appropriate format.

IID 25. Given information concerning a specified job or position, compose a letter of application for the position using correct grammar, punctuation, spelling, and capitalization.

IID 26. Given a paragraph of biographical data and a job application form, complete the job application form with 100% accuracy.

IIE 27. Given a specified topic for a manuscript or report, correctly compose an outline in preparation for researching and writing a manuscript or report.

IIE 28. Given proper reference materials and instructions for writing a manuscript or report on a specified topic, compose a manuscript or report using correct format, grammar, punctuation, spelling, and capitalization.

IIE 29. Given an original manuscript or report, develop a bibliography for the manuscript or report using correct format.

## OBJECTIVES – BUSINESS ENGLISH

IIE 30. Given a classroom situation depicting a business meeting, develop minutes of the meeting using correct format with accurate content.

IIIA 31. Given situations requiring oral communication skills for effective business conversations, make appropriate responses.

IIIA 32. Given a role-playing situation and checklist emphasizing proper procedures and conduct for a job interview, complete each task on the checklist with 100% accuracy.

IIIB 33. Given a three-minute time limit, a topic and a topic outline, and a checklist, give a grammatically correct oral presentation displaying proper body language and gestures as specified on the checklist.

IIIB 34. Given a taped conversation, messages to be interpreted, and a set of questions designed to test listening, complete the questions with 100% accuracy.

IIIC 35. Given a role-playing situation and checklist, display proper human relations as specified on an evaluation checklist with 100% accuracy.

IIIC 36. Given case studies designed to test the ability to solve communication problems in an office situation effectively, complete the case studies accurately.

IIIC 37. Given a self-analysis checklist designed to rate knowledge of effective communication on the job, objectively complete the evaluation checklist and evaluate weak areas.

## BUSINESS ENGLISH CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Identifies seven parts of speech. | | | |
| IB | Composes four types of sentences according to grammatical construction. | | | |
| IB | Composes four types of sentences that imply purpose. | | | |
| IC | Punctuates sentences correctly using internal punctuation marks. | | | |
| IC | Identifies marks of end punctuation. | | | |
| ID | Lists abbreviations for states, titles, firm names, geographical names, government agencies, academic degrees, and associations. | | | |
| ID | Indicates proper capitalization for proper names, publications, titles, organizations, calendar terms, and historical periods. | | | |
| ID | Expresses numbers correctly in figures and words. | | | |
| IE | Arranges sentences in logical sequence for developing paragraphs. | | | |
| IE | Edits and rewrites paragraphs correctly. | | | |
| IF | Defines and spells correctly a list of business words. | | | |

## BUSINESS ENGLISH CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IG | Writes sentences that show precision in choosing words for context. | | | |
| IG | Uses the dictionary and the thesaurus to correct inappropriate words. | | | |
| IG | Locates assigned information in a telephone directory and in a city directory. | | | |
| IG | Demonstrates proper use of *Readers' Guide to Periodical Literature*, reference manuals, and word division guides. | | | |
| IIA | Identifies grammatical, spelling, and punctuation errors in sentences and paragraphs. | | | |
| IIB | Completes a set of tasks designed to test knowledge on the psychology of communication. | | | |
| IIC | Identifies the structural parts of a business letter. | | | |
| IIC | Writes letters in selected styles. | | | |
| IIC | Composes a short memorandum using correct grammar, punctuation, spelling, and capitalization. | | | |
| IIC | Responds to letters of inquiry and provides information requested. | | | |
| IIC | Composes messages of goodwill using correct grammar, punctuation, spelling, and capitalization. | | | |
| IIC | Composes letters of employment, claim and adjustment, credit and collection, sales and promotion using specified psychological techniques of communication. | | | |

## BUSINESS ENGLISH CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IID | Composes a personal data sheet or resume according to a specified format. | | | |
| IID | Composes a letter of application for a specified position using correct grammar, punctuation, spelling, and capitalization. | | | |
| IID | Completes an application form for a specified position using a paragraph of biographical data. | | | |
| IIE | Composes a topic outline for an original report or manuscript on a specified topic. | | | |
| IIE | Composes a report or manuscript using a specified outline, proper reference materials, and correct grammar, punctuation, spelling, and capitalization. | | | |
| IIE | Develops a bibliography from a specified original report or manuscript using correct format. | | | |
| IIE | Writes, edits, and revises minutes of a meeting in a classroom situation using correct format. | | | |
| IIIA | Demonstrates the ability to engage in a business conversation during a classroom situation. | | | |
| IIIA | Demonstrates specified procedures and conduct during a job interview situation. | | | |
| IIIB | Displays effective body language, positive behavior, neat appearance, and a positive attitude during a three-minute classroom presentation. | | | |
| IIIB | Completes a set of tasks designed to test the ability to listen and to interpret messages accurately. | | | |

## BUSINESS ENGLISH CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IIIC | Demonstrates through role playing the qualities of good human relations as specified on an evaluation checklist. | | | |
| IIIC | Completes case studies designed to test the ability to solve communication problems effectively in an office situation. | | | |
| IIIC | Completes a self-analysis checklist designed to rate knowledge of effective communication on the job. | | | |
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| PROFICIENCY RATING | |
|---|---|
| **Scale Value** | **Definition** |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

**WORK HABITS**

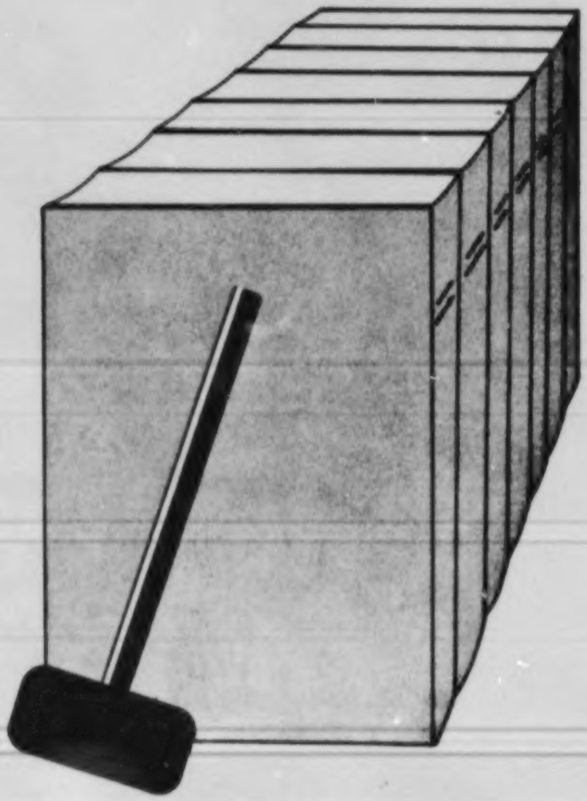
In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________



# BUSINESS LAW

## BUSINESS LAW

### Description

This course is designed to acquaint the student with some of the legal problems and rights encountered by the American citizen. The course will include the history of law and its meaning in our society; in addition, other topics such as laws relating to minors, elements of contracts, bailments, sales contracts, property rights, and insurance will be presented.

### Purpose

The purpose of this course is to expand the legal vocabulary of the student as well as sharpen the student's ability to think systematically and logically. As an American consumer, the student will be better equipped to recognize legal problems and to utilize professional counsel when necessary.

# COURSE OUTLINE – BUSINESS LAW

I. Meaning of Law

- A. Determining sources of law
- B. Developing our law system
- C. Justifying our law system
- D. Classifying law

II. Examining Criminal Law

- A. Classifying crimes
- B. Determining liability for crimes
- C. Trying the criminal case
- D. Punishing individuals for crimes

III. Analyzing Civil Law and Torts

- A. Understanding consequences of common tort actions
- B. Trying the civil case

IV. Relating Law to the Minor and the Family

- A. Determining rights and duties of parents or guardians
- B. Determining rights and duties of students
- C. Enforcing a minor's contract for necessaries
- D. Examining the South Carolina juvenile justice system

V. Enforcing the Law

- A. Enforcing the law at the local level
- B. Determining jurisdiction of the court
- C. Understanding due process
- D. Outlining the South Carolina court system
- F. Outlining the federal court system

VI. Protecting the Consumer and the Environment

- A. Expressing and implying a warranty
- B. Creating liability for products
- C. Examining current legislation for consumer protection
- D. Examining current legislation for environmental protection

VII. Making Valid Contracts

- A. Identifying the elements of a valid contract
- B. Making a valid offer and acceptance
- C. Determining competent parties
- D. Identifying illegal agreements
- E. Understanding need for valid consideration
- F. Understanding the Statute of Frauds
- G. Assigning contractual rights

VIII. Creating Void, Voidable, and Illegal Agreements

- A. Entering into a contract through unfair advantage
- B. Contracting with an incompetent party
- C. Making an illegal agreement
- D. Determining the effect of void, voidable, and illegal agreements

IX. Discharging Contracts

- A. Performing obligations in a contract
- B. Breaching a contract
- C. Agreeing to end a contract
- D. Claiming impossibility of performance in a contract
- E. Discharging by other means
- F. Determining remedies for nonperformance

X. Characterizing Bailment Relationships

- A. Defining property rights and bailment relationships
- B. Creating a mutual benefit bailment
- C. Creating gratuitous bailments
- D. Determining rights and duties of the bailee and bailor

XI. Making Contracts for the Sale of Goods

- A. Forming the sales contract
- B. Securing evidence of ownership
- C. Transferring ownership
- D. Passing title
- E. Transferring risk of loss in special sales transactions
- F. Choosing a remedy for breach of sales contracts

XII. Buying on Credit

- A. Identifying the two types of credit
- B. Using credit cards
- C. Protecting the consumer and creditor

XIII. Applying Law to Employment

- A. Making an employment contract
- B. Regulating employment through legislation
- C. Protecting employees through legislation
- D. Relating minors to employment regulations and legislation

XIV. Applying Law to Agency

- A. Forming the agency relationship
- B. Dealing with the agency relationship
- C. Terminating the agency relationship

## COURSE OUTLINE – BUSINESS LAW

XV. Meeting Financial Obligations

- A. Using various kinds of commercial paper
- B. Negotiating commercial paper
- C. Meeting financial responsibility

XVI. Protecting Against Loss

- A. Insuring life
- B. Insuring against fire and casualty
- C. Insuring automobiles

XVII. Using Real Property

- A. Owning real property
- B. Renting real property
- C. Disposing of real property

XVIII. Understanding Forms of Business Organization

- A. Forming, operating, and dissolving sole propriertorship
- B. Forming, operating, and dissolving partnerships
- C. Forming, operating, and dissolving corporations

## COMPETENCIES – BUSINESS LAW

The student is required to demonstrate the following competencies in order to complete successfully Business Law.

| | | |
|---|---|---|
| I-XVIII | 1. | Define the terms associated with each topic studied in the course. |
| IA–D | 2. | Identify the terminology relating to the sources, development, justification, and classifications of law. |
| IIA, B,D | 3. | Classify several crimes, determine liability and list legal consequences. |
| IIC | 4. | Complete statements relating to the procedures for getting a criminal case into and through court. |
| IIIA | 5. | Demonstrate an understanding of how some actions are a crime, a tort, or both and indicate the legal consequences for each. |
| IIIB | 6. | Complete statements relating to the procedures for getting a civil case into and through court. |
| IVA–B | 7. | Identify the legal rights and duties of parents or guardians and students. |
| IVC | 8. | List the four requirements for a contracted item to be considered a necessity for a minor. |
| IVD | 9. | Demonstrate an understanding of the purpose and jurisdiction of the South Carolina juvenile justice system. |
| VA | 10. | Identify the terminology associated with local law enforcement. |
| VB | 11. | Demonstrate an understanding of how jurisdiction is determined in the federal and South Carolina court systems. |
| VC | 12. | Demonstrate an understanding of due process and how it works. |
| VD–E | 13. | Identify the various courts and their jurisdiction in both the federal and South Carolina court systems. |
| VIA | 14. | Identify the types of warranties, both express and implied, made by sellers. |
| VIB | 15. | Identify the types of product liability and responsibility on the parts of the manufacturer and the seller. |
| VIC–D | 16. | List five current laws or regulations aimed at protecting the consumer and/or the environment. |
| VIIA | 17. | List the five elements of a valid contract. |

## COMPETENCIES – BUSINESS LAW

| | | |
|---|---|---|
| VIIB | 18. | Identify the essential elements of making and ending an offer and effecting an acceptance. |
| VIIC | 19. | Demonstrate an understanding of the legal definition of competent parties. |
| VIID | 20. | Identify the kinds of agreements which are illegal and the legal consequences for entering into an illegal agreement. |
| VIIE | 21. | Demonstrate an understanding of the need for consideration in a contract. |
| VIIF | 22. | Identify which contracts must be in writing to be enforceable according to the Statute of Frauds. |
| VIIG | 23. | Demonstrate an understanding of the use of assignment and the differences between assignment and delegation of duties. |
| VIIIA–D | 24. | Identify void, voidable, and illegal agreements. |
| IXA–E | 25. | List five ways in which contracts may be discharged. |
| IXF | 26. | List three remedies available for breach of contract. |
| XA | 27. | Demonstrate an understanding of the role of property rights in the bailment relationship and reasons some transactions are not bailments. |
| XB | 28. | Demonstrate an understanding of the terminology relating to mutual benefit bailments. |
| XC | 29. | Demonstrate an understanding of the terminology relating to the various types of gratuitous bailments. |
| XD | 30. | Demonstrate an understanding of the rights and duties of both the bailee and bailor in mutual and gratuitous bailments. |
| XIA | 31. | Demonstrate an understanding of how sales contracts are formed and executed. |
| XIB–C | 32. | Identify the terminology relating to written evidence of ownership in securing and transferring goods. |
| XID–F | 33. | Demonstrate a knowledge of the point at which title of goods passes, when risk of loss is transferred in various sales transactions, and the remedy available for breach. |
| XIIA–C | 34. | Demonstrate an understanding of the use of the two types of credit and how the law protects the consumer and the creditor. |

## COMPETENCIES – BUSINESS LAW

XIIIA–D 35. Demonstrate an understanding of how an employment contract is made and how the law regulates and protects employers and employees, including minors.

XIVA–C 36. Demonstrate an understanding of how an agency relationship is formed, operated, and terminated.

XVA–C 37. Identify the various kinds of commercial paper and how each is negotiated in meeting financial responsibilities.

XVIA–C 38. Identify the three basic kinds of insurance available to the consumer in terms of their coverages.

XVIIA–C 39. Identify the terminology relating to owning, renting, and disposing of real property during life and after death.

XVIIIA–B40. Demonstrate a knowledge of how to form, operate, and dissolve a sole proprietorship, a partnership, and/or a corporation.

## OBJECTIVES – BUSINESS LAW

| | | |
|---|---|---|
| I–XVIII | 1. | Given terms related to each topic as it is studied, correctly use the terms to complete statements. |
| IA–D | 2. | Given a list of terms and definitions relating to the sources, development, justification, and classifications of law, correctly match the terms to the proper definitions. |
| IIA,B,D | 3. | Given a list of various crime situations, properly classify each as a felony or misdemeanor and indicate the liability and the punishment for each. |
| IIC | 4. | Given a list of terms relating to criminal court procedures, correctly complete blanks in statements using the terms. |
| IIIA | 5. | Given a list of various acts committed by an individual(s), correctly indicate whether each is a crime, a tort, or both and indicate the legal consequences in each situation. |
| IIIB | 6. | Given a list of terms relating to a civil court procedure, correctly complete blanks in statements using the terms. |
| IVA–B | 7. | Given multiple-choice statements relating to the rights and duties of parents or guardians and students, select the correct completion for each statement. |
| IVC | 8. | Given the statement, "List the four requirements which must be met in order for an item to be considered a necessity for a minor," correctly list the four requirements. |
| IVD | 9. | Given a list of true and false statements relating to the purposes and jurisdiction of the South Carolina juvenile justice system, correctly identify those which are true and those which are false. |
| VA | 10. | Given a list of terms relating to local law enforcement and a list of definitions and explanations of those terms, correctly match the terms with the proper definitions and explanations. |
| VB | 11. | Given the question, "What is meant by federal and state jurisdiction and how is jurisdiction determined?", answer the question correctly. |
| VC | 12. | Given the statement, "Explain what is meant by due process and how it works," correctly write a complete explanation. |
| VD–E | 13. | Given a list of various actions to be tried in court and a list of the courts in the federal and South Carolina court systems, select the correct court level at which each suit would begin. |
| VIA | 14. | Given statements relating to express and implied warranties made by sellers, correctly identify those which are true and those which are false. |

## OBJECTIVES – BUSINESS LAW

| | | |
|---|---|---|
| VIB | 15. | Given statements relating to the types of product liability and the responsibility of manufacturers and sellers, correctly identify those statements which are true and those which are false. |
| VIC–D | 16. | Given the statement, "List five current laws or regulations aimed at protecting the consumer and/or the environment," correctly list five laws or regulations. |
| VIIA | 17. | Given the statement, "List the five elements necessary for a valid contract," list the five elements correctly. |
| VIIB | 18. | Given several situations relating to offer and acceptance, correctly indicate whether or not each statement situation contains an offer and an acceptance. |
| VIIC | 19. | Given several statements relating to competent parties, correctly indicate whether each statement identifies a competent or incompetent party. |
| VIID | 20. | Given a list of agreements, correctly select those which are illegal and indicate the legal consequences for each. |
| VIIE | 21. | Given a list of agreements relating to consideration, correctly identify those having valid consideration. |
| VIIF | 22. | Given a list of contracts, correctly select those which must be in writing to be enforceable according to the Statute of Frauds. |
| VIIG | 23. | Given a list of contracts, correctly decide which contracts may be assigned and which may be a delegation of duties. |
| VIIIA–D | 24. | Given a list of defective agreements, correctly identify what statement(s) makes the agreement void, voidable, or illegal. |
| IXA–E | 25. | Given the statement, "List five ways in which contracts may be discharged," correctly list five ways. |
| IXF | 26. | Given the statement, "List three remedies available for breach of contract," correctly list three remedies. |
| XA | 27. | Given multiple-choice statements relating to the role of property rights in the bailment relationship and reasons some transactions are not bailments, select the correct completion for each statement. |
| XB | 28. | Given multiple-choice statements relating to mutual benefit bailments, select the correct completion for each statement. |
| XC | 29. | Given multiple-choice statements relating to gratuitous bailments, select the correct completion for each statement. |

## OBJECTIVES – BUSINESS LAW

XD 30. Given a list of both mutual benefit bailments and gratuitous bailments, correctly indicate the rights and duties of the bailee and bailor in each situation.

XIA 31. Given multiple-choice statements relating to the formation and execution of sales contracts, select the correct completion for each statement.

XIB–C 32. Given multiple-choice statements relating to written evidence of ownership of goods in securing and transferring ownership, select the correct completion for each statement.

XID–F 33. Given a list of sales transactions, correctly identify the specific point at which title and risk of loss passes to the buyer and the remedy available for breach.

XIIA–C 34. Given multiple-choice statements relating to the use of the two types of credit and how the law protects the consumer and creditor, select the correct completion for each statement.

XIIIA–D 35. Given multiple-choice statements relating to how employment contracts are made and how the law regulates and protects employers and employees including minors, select the correct completion for each statement.

XIVA–C 36. Given multiple-choice statements relating to forming, operating, and terminating an agency relationship, select the correct completion for each statement.

XVA–C 37. Given samples of various kinds of commercial paper, correctly identify each kind and accurately give a written explanation of the negotiation of each one in meeting financial responsibilities.

XVIA–C 38. Given multiple-choice statements relating to the three basic kinds of insurance available to the consumer in terms of their coverages, select the correct completion for each statement.

XVIIA–C 39. Given multiple-choice statements relating to owning, renting, and disposing of real property, select the correct completion for each statement.

XVIIIA–B 40. Given multiple-choice questions relating to forming, operating, and disposing of partnerships, sole proprietorships, and/or corporations, select the correct completion for each question.

## BUSINESS LAW CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| I-XVIII | Defines the terms associated with each topic studied in the course. | | | |
| IA-D | Identifies the terminology relating to the sources, development, justification, and classifications of law. | | | |
| IIA,B,D | Classifies crimes and indicates liability and legal consequences. | | | |
| IIC | Completes statements relating to the procedures for getting a criminal case tried in court. | | | |
| IIIA | Demonstrates an understanding of how some actions are a crime, a tort, or both and indicates the legal consequences of each. | | | |
| IIIB | Completes statements relating to the procedures for getting a civil case tried in court. | | | |
| IVA-B | Identifies the legal rights and duties of parents or guardian and students. | | | |
| IVC | Lists the four requirements for an item to be considered a necessity for a minor. | | | |
| IVD | Demonstrates an understanding of the purpose and jurisdiction of the South Carolina juvenile justice system. | | | |
| VA | Identifies terms and definitions related to local law enforcement. | | | |
| VB | Demonstrates an understanding of what is federal and state jurisdiction and how it is determined. | | | |

## BUSINESS LAW CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VC | Demonstrates an understanding of what is meant by due process and how it works. | | | |
| VD-E | Demonstrates an understanding of the jurisdiction of the various court levels in the federal and South Carolina court systems. | | | |
| VIA | Identifies the types of warranties, both express and implied, made by sellers. | | | |
| VIB | Identifies the types of product liability and the responsibility of manufacturers and sellers. | | | |
| VIC-D | Lists five current laws and regulations aimed at protecting the consumer and/or the environment. | | | |
| VIIA | Lists the five necessary elements of a valid contract. | | | |
| VIIB | Identifies the essential elements of making and ending an offer and effecting an acceptance. | | | |
| VIIC | Demonstrates an understanding of the legal definition of competent party. | | | |
| VIID | Identifies the kinds of agreements which are illegal and the legal consequences for entering into an illegal agreement. | | | |
| VIIE | Demonstrates an understanding of the need for valid consideration. | | | |
| VIIF | Identifies which contracts must be in writing to be enforceable according to the Statute of Frauds. | | | |

## BUSINESS LAW CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIIG | Demonstrates an understanding of the use of assignments and the differences between an assignment and delegation of duties. | | | |
| VIIIA-D | Identifies various defects in agreements and indicates what made the agreement void, voidable, or illegal. | | | |
| IXA-E | Lists five ways in which contracts may be discharged. | | | |
| IXF | Lists three remedies available for breach of contract. | | | |
| XA | Demonstrates an understanding of the role of property rights in the bailment relationship and reasons some transactions are not bailment relationships. | | | |
| XB | Demonstrates an understanding of the terminology relating to mutual benefit bailments. | | | |
| XC | Demonstrates an understanding of the terminology relating to the various types of gratuitous bailments. | | | |
| XD | Demonstrates an understanding of the rights and duties of both bailee and bailor in a bailment. | | | |
| XIA | Demonstrates an understanding of how sales contracts are formed and executed. | | | |
| XIB-C | Identifies the terminology relating to written evidence of ownership in securing and transferring goods. | | | |
| XID-F | Demonstrates a knowledge of the point at which title to goods passes, when risk of loss is transferred in transactions, and the remedy available for breach. | | | |

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## BUSINESS LAW CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| XIIA-C | Demonstrates an understanding of the use of the two types of credit and how the law protects the consumer and the creditor. | | | |
| XIIIA-D | Demonstrates an understanding of how an employment contract is made and how the law regulates and protects employers and employees, including minors. | | | |
| XIVA-C | Demonstrates an understanding of how an agency relationship is formed, operated, and terminated. | | | |
| XVA-C | Identifies the various kinds of commercial paper and how each is negotiated in meeting financial responsibilities. | | | |
| XVIA-C | Identifies the three basic kinds of insurance available to the consumer in terms of their coverages. | | | |
| XVIIA-C | Identifies the terminology relating to owning, renting, and disposing of real property during life and after death. | | | |
| XVIIIA-B | Demonstrates a knowledge of how to form, operate, and dissolve a sole proprietorship, a partnership, and/or a corporation. | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| PROFICIENCY RATING | |
|---|---|
| **Scale Value** | **Definition** |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

**WORK HABITS**

In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

| | |
|---|---|
| Phase I | Grade ________ |
| Phase II | Grade ________ |
| | Final Grade ________ |

# BUSINESS MATHEMATICS

## BUSINESS MATHEMATICS

### Description

This course is designed to provide the student with fundamental mathematical skills necessary for consumer finance and entry-level positions in business.

### Purpose

The purpose of this course is to provide the student with fundamental math skills and basic principles applicable to personal business use and to fields of employment.

## COURSE OUTLINE – BUSINESS MATHEMATICS

I. Fundamentals of Business Mathematics

   A. Solving addition and subtraction problems
   B. Solving multiplication and division problems
   C. Solving problems involving fractions and percents

II. Personal Money Records

   A. Determining personal cash records totals
   B. Keeping personal checkbook records
   C. Preparing a bank reconciliation

III. Consumer Purchases

   A. Computing sales tax
   B. Completing sales slips
   C. Calculating unit prices
   D. Calculating large-unit prices
   E. Calculating fractional-unit prices
   F. Handling money and making change

IV. Personal Income Records and Computations

   A. Computing wage income
   B. Computing commission income
   C. Computing graduated-commission income

V. Loans, Notes, and Installments

   A. Computing interest on promissory notes
   B. Computing interest on bank notes
   C. Computing interest on finance company loans
   D. Computing finance charges and installment payments

VI. Savings Accounts and Life Insurance

   A. Determining the amount and type of life insurance
   B. Computing the balance of a passbook/savings account

VII. Home Ownership

   A. Figuring the costs of home ownership
   B. Figuring taxes on a home
   C. Determining the amount and type of home insurance needed
   D. Determining cost of utilities
   E. Determining cost of telephone
   F. Comparing prices of goods and services

VIII. Transportation and Shipping of Goods

   A. Figuring automobile ownership expenses
   B. Determining the amount and type of automobile insurance needed
   C. Computing the cost of shipping items by parcel post, express, and freight

IX. Financial Statements

   A. Preparing balance sheet
   B. Preparing income statement

X. Retail Buying

   A. Calculating trade discounts
   B. Calculating cash discounts

XI. Retail Selling

   A. Determining profit or loss on goods sold
   B. Computing price markups
   C. Coding sales tags

XII. Wholesale Purchasing

   A. Checking invoice price extensions
   B. Completing sales invoices

XIII. Manufacturer Selling

   A. Figuring total manufacturing costs
   B. Calculating price of manufactured items

XIV. Business Ownership

   A. Determining total office/factory costs of operation
   B. Distributing partnership income
   C. Distributing corporate income

XV. Practical Metric Measurements

   A. Measuring using United States system
   B. Measuring using the metric system

## COMPETENCIES – BUSINESS MATHEMATICS

The student is required to demonstrate the following competencies in order to complete successfully Business Mathematics.

IA 1. Solve math problems involving addition and subtraction.

IB 2. Solve math problems involving multiplication and division.

IC 3. Change decimal numbers to fractions and fractions to decimals.

IC 4. Change percents to decimals and decimals to percents.

IIA 5. Determine personal cash record totals.

IIB 6. Keep personal checkbook records.

IIC 7. Prepare a bank reconciliation.

IIIA 8. Compute sales tax.

IIIB 9. Complete sales slips.

IIIC 10. Calculate unit prices.

IIID 11. Calculate prices on large units.

IIIE 12. Calculate prices on fractions of units.

IIIF 13. Handle money and make change.

IVA 14. Prepare complete payroll register.

IVB–C 15. Figure salaries based on commissions and graduated commissions.

VA–C 16. Compute interest, total due at maturity, and due date on a promissory note, bank note, or finance company loan.

VD 17. Figure finance charges and installment payments.

VIA 18. Determine the amount and type of life insurance needed.

VIB 19. Compute the balance of a passbook/savings account.

VIIA 20. Figure home ownership expenses.

VIIB 21. Compute the amount of taxes based on assessed value.

VIIC 22. Determine the amount and type of home insurance needed.

VIID 23. Determine the cost of utilities (gas, water, lights, garbage, etc.).

VIIE 24. Determine the cost of telephone services.

VIIF 25. Compare prices of goods and services.

## COMPETENCIES – BUSINESS MATHEMATICS

| | | |
|---|---|---|
| VIIIA | 26. | Figure automobile ownership expenses. |
| VIIIB | 27. | Determine the amount and type of automobile insurance needed. |
| VIIIC | 28. | Compute the cost of shipping items by parcel post, express, and freight. |
| IXA | 29. | Prepare a balance sheet. |
| IXB | 30. | Prepare an income statement. |
| XA–B | 31. | Calculate trade and cash discounts. |
| XIA | 32. | Determine profit/loss on goods sold. |
| XIB | 33. | Compute price markups. |
| XIC | 34. | Code sales tags. |
| XIIA | 35. | Check invoice price extensions. |
| XIIB | 36. | Complete sales invoices. |
| XIIIA | 37. | Figure total manufacturing costs. |
| XIIIB | 38. | Calculate price of manufactured items. |
| XIVA | 39. | Determine total office/factory costs of operation. |
| XVA-B | 40. | Distribute partnership and corporate income. |
| XVA–B | 41. | Measure using the United States and metric systems. |

# OBJECTIVES – BUSINESS MATHEMATICS

IA 1. Given ten problems, correctly add and subtract each one.

IB 2. Given ten problems, correctly multiply and divide each one.

IC 3. Given ten decimal numbers, convert each one to its proper fractional equivalent.

IC 4. Given ten fractions, convert each one to its proper decimal equivalent.

IC 5. Given ten percentages, change each to its proper decimal equivalent.

IC 6. Given ten decimal numbers, change each to its proper percent equivalent.

IIA 7. Given cash record data for one month, keep personal cash record totals. The total should equal the amount shown in the total payments column.

IIB 8. Given information on a previous balance, deposits, and amount of checks written, determine personal checkbook balance. All entries must be accurate.

IIC 9. Given information on a previous checkbook balance, service charges, bank statement balance, outstanding checks, and adjustments, prepare a bank reconciliation. The balance in the cash account and the reconciled amount on the bank statement must be in agreement and represent the actual cash balance.

IIIA 10. Given ten invoices, correctly compute the amount of sales tax.

IIIB 11. Given ten sales slips and the amount of each item, complete sale slips, extend prices, add tax amount, and total. The slips must be completely accurate.

IIIC–D 12. Given a variety of ten items and their respective costs, correctly calculate unit and large-unit prices.

IIIE 13. Given a variety of ten items and their respective group costs, correctly calculate fractional-unit prices.

IIIF 14. Given the prices of ten items and various denominations of money, compute the proper amount of change for each customer. The change plus the amount of the item and tax must equal the amount of money given by the customer.

IVA–B 15. Given hourly rates, number of hours worked, various types of deductions, and the number of deductions, compute wage income using proper FICA and income tax tables. All totals of the payroll register must balance and be computed accurately.

IVC 16. Given the rate of commission and the amount of sales for ten salespersons, compute the income for one week. The amount of commission must be computed accurately.

IVD 17. Given the rate of graduated commission and the amount of sales for ten salespersons, compute the income for one week. The amount of commission must be computed accurately.

## OBJECTIVES – BUSINESS MATHEMATICS

VA–C 18. Given the amount of ten loans, the interest rate, and the period of time involved, calculate the interest amount due at maturity of the loans. The amounts must be computed accurately.

VD 19. Given the cash price, downpayment amount, and installment terms, compute the finance charges and installment payments accurately.

VIA 20. Given ten case situations and financial information, determine the amount and type of life insurance needed for each case. The amount and type of life insurance must agree with the instructor's key.

VIB 21. Given a passbook record with withdrawals, deposits, and interest, compute the balance. The adjusted balance must agree with the actual amount of cash in savings.

VIIA 22. Given a list of typical home ownership expenses for one year, correctly figure the costs of home ownership.

VIIB 23. Given the tax assessment rate, correctly figure taxes on a home. The amount of taxes must agree with the figure shown on the tax tables.

VIIC 24. Given a list of coverages needed on a home and the types of home insurance available, correctly match the type of coverage needed to the appropriate type of insurance. The amount and type of insurance selected must agree with the instructor's key.

VIID–E 25. Given a list of the typical home utilities and telephone rates, determine the cost of each utility and the telephone bill for ten case situations. The amount computed must agree with the instructor's key.

VIIF 26. Given a variety of similar goods and services, compare the cost of each good and service. The selected cost of each good and service must be the best good/service for the amount of money spent.

VIIIA 27. Given a list of typical automobile expenses for one year, figure the cost of automobile ownership accurately.

VIIIB 28. Given ten case situations and financial information, determine the amount and type of automobile insurance needed for each case. The amount and type of automobile insurance must agree with the instructor's key.

VIIIC 29. Given three types of transportation services and their rates and ten items for shipment, compute the cost of shipping each item by parcel post, express, and freight. The amount computed must be accurate.

IXA 30. Given the assets, liabilities, and capital of a business, prepare a balance sheet in the correct form. Total assets must equal total liabilities plus capital.

IXB 31. Given the amounts of income, cost of goods sold, and expenses, prepare an income statement in the correct form. All entries must be legible, correct and error free, and totals must balance.

## OBJECTIVES – BUSINESS MATHEMATICS

XA–B 32. Given the prices and a variety of trade and cash discounts for ten invoices, calculate the amount of each discount. The total column must equal the total paid plus the discount taken.

XIA 33. Given the cost and the selling price of ten items, accurately compute the amount of profit or loss on each item.

XIB 34. Given the selling price and the percent of markup, correctly compute the price markup of ten items.

XIC 35. Given the sales codes and prices for ten items, code the sales tags accurately.

XIIA–B 36. Given prices for ten invoices and terms of each sale, extend prices and complete the invoices correctly and accurately.

XIIIA 37. Given the amount of materials, labor, overhead, and manufacturing expenses, figure the total manufacturing cost for ten items accurately.

XIIIB 38. Given the cost of materials, labor, overhead, manufacturing expenses, and percent of markup for ten items, calculate the price of each item accurately.

XIVA 39. Given a list of expenses for ten items of office/factory equipment, supplies, and materials, accurately determine the total costs of operation.

XIVB-C 40. Given the distribution ratios and net income for ten partnerships and corporations, correctly distribute the income.

XVA-B 41. Given five classroom items and common United States and metric measuring tools, accurately measure the length, height, and weight of each item.

## BUSINESS MATHEMATICS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Solves math problems involving addition and subtraction. | | | |
| IB | Solves math problems involving multiplication and division. | | | |
| IC | Changes decimal numbers to fractions and fractions to decimals. | | | |
| IC | Changes percents to decimals and decimals to percents. | | | |
| IIA | Determines personal cash record totals. | | | |
| IIB | Keeps personal checkbook records. | | | |
| IIC | Prepares a bank reconciliation. | | | |
| IIIA | Computes sales tax. | | | |
| IIIB | Completes sales slips. | | | |
| IIIC | Calculates unit prices. | | | |
| IIID | Calculates prices on large units. | | | |

## BUSINESS MATHEMATICS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IIIE | Calculates prices on fractions of units. | | | |
| IIIF | Handles money and makes change. | | | |
| IVA | Prepares complete payroll register. | | | |
| IVB-C | Figures salaries based on commissions and graduated commissions. | | | |
| VA-C | Computes interest, total due at maturity, and due date on a promissory note, bank note, or finance company loan. | | | |
| VD | Figures finance charges and installment payments. | | | |
| VIA | Determines the amount and type of life insurance needed. | | | |
| VIB | Computes the balance of a passbook/savings account. | | | |
| VIIA | Figures home ownership expenses. | | | |
| VIIB | Computes the amount of taxes based on assessed value. | | | |
| VIIC | Determines the amount and type of home insurance needed. | | | |

## BUSINESS MATHEMATICS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIID | Determines the cost of utilities (gas, water, lights, garbage, etc.). | | | |
| VIIE | Determines the cost of telephone services. | | | |
| VIIF | Compares prices of goods and services. | | | |
| VIIIA | Figures automobile ownership expenses. | | | |
| VIIIB | Determines the amount and type of automobile insurance needed. | | | |
| VIIIC | Computes the cost of shipping items by parcel post, express, and freight. | | | |
| IXA | Prepares a balance sheet. | | | |
| IXB | Prepares an income statement. | | | |
| XA-B | Calculates trade and cash discounts. | | | |
| XIA | Determines profit/loss on goods sold. | | | |
| XIB | Computes price markups. | | | |

## BUSINESS MATHEMATICS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| XIC | Codes sales tags. | | | |
| XIIA | Checks invoice price extensions. | | | |
| XIIB | Completes sales invoices. | | | |
| XIIIA | Figures total manufacturing costs. | | | |
| XIIIB | Calculates price of manufactured items. | | | |
| XIVA | Determines total office/factory costs of operation. | | | |
| XIVB-C | Distributes partnership and corporate income. | | | |
| XVA-B | Measures using the United States and metric systems. | | | |
| | | | | |
| | | | | |
| | | | | |

| PROFICIENCY RATING | |
|---|---|
| Scale Value | Definition |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

**WORK HABITS**

In the instructor's opinion, this student:

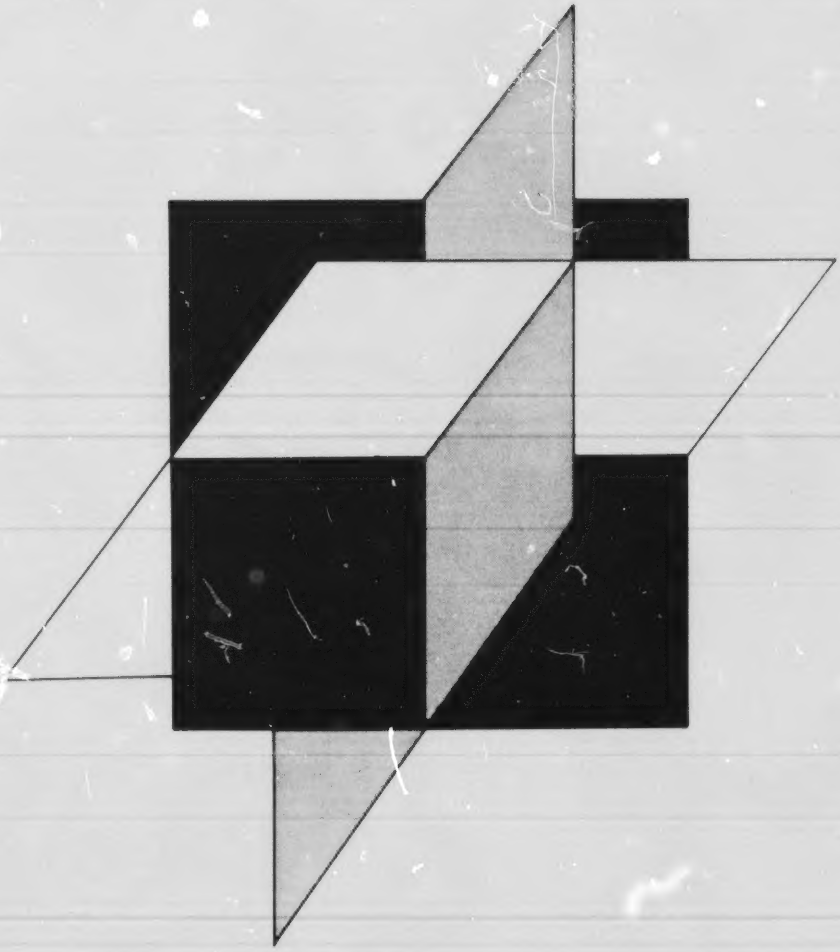
| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________

BUSINESS PRINCIPLES
AND MANAGEMENT



# BUSINESS PRINCIPLES AND MANAGEMENT

## BUSINESS PRINCIPLES AND MANAGEMENT

### Description

This course is designed to offer a general overview of the American free enterprise system. A study is made of various forms of business ownership, the internal organization and management functions of business, and the financing of business. Content is focused on the concepts and practices of business or office management. Considerable emphasis is also placed on the managerial process and the management functions of planning, organizing, motivating, and controlling.

### Purpose

The purpose of this course is to provide the student with an increased knowledge of the American free enterprise system so that the student may become a more discerning consumer as well as a better-informed citizen and producer. The student will have an opportunity to examine career opportunities both in supervisory and administrative management occupations. The student will further examine problems and important considerations in owning a small business.

# COURSE OUTLINE – BUSINESS PRINCIPLES AND MANAGEMENT

I. Capitalism and Other Economic Systems

  A. Defining economic terms
  B. Analyzing economic systems other than capitalism
  C. Analyzing advantages and disadvantages of capitalism
  D. Forming proprietorships, partnerships, and corporations

II. Ownership of a Small Business

  A. Performing business activities
  B. Succeeding and failing with a small business
  C. Keeping records in a small business
  D. Allowing credit accounts
  E. Maintaining budgets for advertising
  F. Contributing to employee morale
  G. Maintaining current information

III. Money

  A. Defining money
  B. Using money
  C. Controlling money flow

IV. Credit

  A. Defining credit
  B. Buying on installment
  C. Using credit cards
  D. Using and misusing credit

V. Banking

  A. Defining banking
  B. Using bank services
  C. Controlling bank activities – Federal Reserve System

VI. Government and Our Natural Resources

  A. Conserving natural resources
  B. Controlling the use of natural resources

VII. Government and Labor Unions

  A. Organizing unions
  B. Controlling union activities

VIII. Promotion of Economic Development and Full Employment

  A. Determining major economic goals of government
  B. Determining fiscal policy
  C. Maintaining monetary policy

IX. Other Functions of Government

- A. Developing human talents
- B. Protecting people and their property
- C. Protecting minority groups
- D. Aiding new and old businesses
- E. Maintaining free and fair competition
- F. Promoting communications
- G. Developing housing and regulating land use
- H. Regulating public utilities

X. Inflation

- A. Defining inflation
- B. Measuring inflation
- C. Curbing inflation

XI. Deflation

- A. Defining deflation
- B. Measuring deflation
- C. Curbing deflation

XII. Planning Function of Management

- A. Planning activities
- B. Planning devices
- C. Setting goals

XIII. Organizing Function of Management

- A. Organizing the work flow
- B. Characterizing effective organization

XIV. Motivating Function of Management

- A. Developing good morale
- B. Being a good manager

XV. Controlling Function of Management

- A. Evaluating goals
- B. Deciding on types of controls

XVI. Job Design

- A. Staffing functions of personnel management
- B. Training new employees
- C. Promoting, transferring, discharging, and laying off employees
- D. Providing job benefits
- E. Evaluating employees

XVII. Leadership

- A. Defining leadership qualities and responsibilities
- B. Developing leadership style
- C. Understanding human behavior

XVIII. Communications in Effective Management

- A. Processing information
- B. Determining communications techniques

XIX. Ethics in Business Management

- A. Determining ethical behavior
- B. Affiliating with professional organizations

XX. Decision Making and Problem Solving

- A. Determining and reducing risks
- B. Using marketing research
- C. Identifying problems
- D. Solving problems

## COMPETENCIES – BUSINESS PRINCIPLES AND MANAGEMENT

The student is required to demonstrate the following competencies in order to complete successfully Business Principles and Management.

I–XX 1. Define business terms associated with each topic studied in the course.

IA 2. Identify terminology relating to economic systems.

IB–C 3. List advantages and disadvantages of capitalism, socialism, and communism.

ID 4. Explain the manner in which proprietorships, partnerships, and corporations are formed.

IIA 5. List seven basic types of business activities.

IIB 6. Identify the reasons that small businesses succeed and fail.

IIC–G 7. Outline major considerations in operating a small business.

IIIA–C 8. Identify terminology relating to the definition of money, its uses, and money flow in our economic system.

IVA–D 9. Define credit and explain the ways in which various forms of credit are used and misused.

VA–C 10. Define banking and explain the manner in which bank activities and services are used and controlled through the Federal Reserve System.

VIA–B 11. Discuss the importance of conserving and controlling the use of our natural resources.

VIIA-B 12. Explain the organization of unions and the ways in which union activities are controlled.

VIIA-C 13. Explain the way in which government determines major economic goals and fiscal policy in order to maintain sound monetary policy and achieve full employment.

IXA–C 14. Explain the process by which government aids in developing human talents and protecting people, their property, and minority groups.

IXD–E 15. Explain the procedures by which government aids both new and old businesses and maintains free and fair competition.

IXF–H 16. Discuss the ways in which government promotes communications, develops housing, and regulates land use and public utilities.

XA–C 17. Define inflation and explain the ways in which it is measured and controlled.

## COMPETENCIES – BUSINESS PRINCIPLES AND MANAGEMENT

| | | |
|---|---|---|
| XIA–C | 18. | Define deflation and explain the ways in which it is measured and controlled. |
| XIIA | 19. | Identify activities involved in the planning function of management. |
| XIIB | 20. | List and explain the devices utilized in the planning function of management. |
| XIIC | 21. | List and explain the kinds of goals used in the planning function of management. |
| XIIIA | 22. | List reasons for the importance of organizing work flow in a logical sequence through the use of organizational charts. |
| XIIIB | 23. | List and explain the characteristics of efficient organization. |
| XIVA | 24. | List and explain the tactics involved in developing good morale. |
| XIVB | 25. | Discuss the characteristics of a good manager. |
| XVA-B | 26. | Discuss the evaluation of goals and the importance of deciding on suitable types of controls. |
| XVIA | 27. | Explain the function of personnel management as related to staffing. |
| XVIB | 28. | List and explain the types of training programs available to personnel management. |
| XVIC | 29. | List and explain the four types of job changes which occur in businesses. |
| XVID | 30. | List and explain the five types of job benefits offered to employees. |
| XVIE | 31. | List and explain six methods of evaluating employees. |
| XVII A-C | 32. | List and explain the qualities and responsibilities which characterize good leadership style as related to understanding human behavior. |
| XVIII A-B | 33. | Identify terminology relating to processing information in a business and determining the desired communication techniques. |
| XIXA | 34. | Identify ethical behavior in business situations. |
| XIXB | 35. | Identify professional organizations available to people in business. |
| XXA-B | 36. | Explain the determination and reduction of risks through the use of marketing research. |
| XXC-D | 37. | Explain the manner in which business problems are identified and solved. |

## OBJECTIVES – BUSINESS PRINCIPLES AND MANAGEMENT

I–XX 1. Given the business terms associated with each topic as it is covered, complete statements using the terms appropriately.

IA 2. Given a list of terms telating to economic systems and a list of definitions, correctly match the terms with the definitions.

IB–C 3. Given a list of advantages and disadvantages of various economic systems, correctly indicate whether each item is a characteristic of capitalism, socialism, or communism.

ID 4. Given multiple-choice statements relating to the formation of proprietorships, partnerships, and corporations, select the correct completion for each statement.

IIA 5. Given the statement, "List the seven basic types of business activities," correctly list seven different activities.

IIB 6. Given multiple-choice statements relating to reasons that small businesses succeed and fail, select the correct completion for each statement.

IIC–G 7. Given multiple-choice statements relating to some of the major considerations in operating a small business, select the correct completion for each statement.

IIIA-C 8. Given a list of terms relating to the definition of money, its uses, and money flow, correctly complete each statement relating to money.

IVA–D 9. Given multiple-choice statements relating to the definition of credit and the use and misuse of credit, select the correct completion for each statement.

VA–C 10. Given multiple-choice statements relating to the definition of banking, the use of bank services, and the control of bank activities through the Federal Reserve System, select the correct completion for each statement.

VIA–B 11. Given the statement, "Discuss the importance of conserving and controlling the use of our natural resources," correctly list at least two reasons for conserving and two reasons for controlling our natural resources.

VIIA-B 12. Given multiple-choice statements relating to the organization of unions and control of the union activities, select the correct completion for each statement.

VIIIA-C 13. Given multiple-choice statements relating to the way in which government determines major economic goals and fiscal policy in order to maintain sound monetary policy and achieve full employment, select the correct completion for each statement.

IXA–C 14. Given multiple-choice statements relating to the process by which government aids in developing human talents and protecting people, their property, and minority groups, select the correct completion for each statement.

IXD–E 15. Given multiple-choice statements relating to the role of government in aiding both new and old businesses and in maintaining free and fair competition, select the correct completion for each statement.

IXF–H 16. Given multiple-choice statements relating to the ways in which government promotes communications, develops housing, and regulates land use and public utilities, select the correct completion for each statement.

XA–C 17. Given a list of statements relating to the definition of inflation and the ways in which it is measured and controlled, correctly indicate which statements are true and which are false.

XIA–C 18. Given a list of statements relating to the definition of deflation and the ways in which it is measured and controlled, correctly indicate which statements are true and which are false.

XIIA 19. Given multiple-choice statements relating to the activities involved in the planning function of management, select the correct completion for each statement.

XIIB 20. Given the statement, "List and explain the devices utilized in the planning function of management," correctly list and explain at least four different devices.

XIIC 21. Given the statement, "List and explain the types of goals which may be set in the planning function of management," correctly list and explain at least four different types of goals.

XIIIA 22. Given multiple-choice statements relating to organizing work flow through the use of organizational charts, select the correct completion for each statement.

XIIIB 23. Given the statement, "Discuss the characteristics of good organization," correctly discuss at least four characteristics of effective organization.

XIVA 24. Given the question, "What are some tactics used in the office to develop and maintain good morale among employees?", correctly list at least four different tactics.

XIVB 25. Given the statement, "Discuss the characteristics of a good manager," correctly discuss at least five different characteristics.

XVA-B 26. Given multiple-choice statements relating to evaluating goals and deciding on suitable controls, select the correct completion for each statement.

XVIA 27. Given multiple-choice statements relating to staffing functions as a part of personnel management, select the correct completion for each statement.

XVIB 28. Given the statement, "List and explain the types of training programs available to personnel management," correctly list and explain at least four different training programs.

XVIC 29. Given the statement, "List and explain the job changes which may occur in business," correctly list and explain four different job changes.

XVID 30. Given the statement, "List and explain the job benefits offered to employees," correctly list and explain five different benefits.

XVIE 31. Given the statement, "List and explain methods of evaluating employees," correctly list and explain six different methods.

XVII A-C 32. Given multiple-choice statements relating to the qualities and responsibilities which characterize good leadership styles as related to understanding human behavior, select the correct completion for each statement.

XVIII A-B 33. Given a list of terms relating to processing information in a business and determining the desired communication techniques, correctly use the terms to complete each statement.

XIXA 34. Given a list of statements relating to human behavior, correctly select those which demonstrate ethical behavior in business situations.

XIXB 35. Given a list of descriptions of the purposes of various professional business organizations, correctly write the official name of the organization for each description.

XXA-B 36. Given multiple-choice statements relating to determining and reducing risks through the use of marketing research, select the correct completion for each statement.

XXC-D 37. Given multiple-choice statements relating to identifying and solving business problems, select the correct completion for each statement.

## BUSINESS PRINCIPLES AND MANAGEMENT CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| I-XX | Defines the business terms associated with each topic studied in the course. | | | |
| IA | Identifies the terminology relating to economic systems. | | | |
| IB-C | Lists the advantages and disadvantages of capitalism, socialism, and communism. | | | |
| ID | Explains the manner in which proprietorships, partnerships, and corporations are formed. | | | |
| IIA | Lists the seven basic types of business activities. | | | |
| IIB | Identifies the reasons that small businesses succeed and fail. | | | |
| IIC-G | Outlines the major considerations in operating a small business. | | | |
| IIIA-C | Identifies the terminology relating to the definition of money, its uses, and money flow in our economic system. | | | |
| IVA-D | Defines credit and explains the ways in which various forms of credit are used and misused. | | | |
| VA-C | Defines banking and explains the manner in which bank activities and services are used and controlled through the Federal Reserve System. | | | |
| VIA-B | Discusses the importance of conserving and controlling the use of our natural resources. | | | |

## BUSINESS PRINCIPLES AND MANAGEMENT CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIIA-B | Explains the organization of unions and the ways in which union activities are controlled. | | | |
| VIIIA-C | Explains the way in which government determines major economic goals and fiscal policy in order to maintain sound monetary policy and achieve full employment. | | | |
| IXA-C | Explains the procedure by which government aids in developing human talents and protecting people, their property, and minority groups. | | | |
| IXD-E | Explains the procedures by which government aids both new and old businesses and maintains free and fair competition. | | | |
| IXF-H | Discusses the ways in which government promotes communications, develops housing, and regulates land use and public utilities. | | | |
| XA-C | Defines inflation and explains the ways in which it is measured and controlled. | | | |
| XIA-C | Defines deflation and explains the ways in which it is measured and controlled. | | | |
| XIIA | Identifies activities involved in the planning function of management. | | | |
| XIIB | Lists and explains the devices utilized in the planning function of management. | | | |
| XIIC | Lists and explains the kinds of goals used in the planning function of management. | | | |
| XIIIA | Lists reasons for the importance of organizing work flow in a logical sequence through the use of organizational charts. | | | |

## BUSINESS PRINCIPLES AND MANAGEMENT CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| XIIIB | Lists and explains the characteristics of efficient organization. | | | |
| XIVA | Lists and explains the tactics involved in developing good morale. | | | |
| XIVB | Discusses the characteristics of a good manager. | | | |
| XVA-B | Discusses the evaluation of goals and the importance of deciding on suitable types of controls. | | | |
| XVIA | Explains the function of personnel management as related to staffing. | | | |
| XVIB | Lists and explains the types of training programs available to personnel management. | | | |
| XVIC | Lists and explains the four types of job changes which occur in businesses. | | | |
| XVID | Lists and explains the five types of job benefits offered to employees. | | | |
| XVIE | Lists and explains six methods of evaluating employees. | | | |
| XVIIA-C | Lists and explains the qualities and responsibilities which characterize good leadership style as related to understanding human behavior. | | | |
| XVIIIA-B | Identifies terminology relating to processing information in a business and determining the desired communication techniques. | | | |

## BUSINESS PRINCIPLES AND MANAGEMENT CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| XIXA | Identifies ethical behavior in business situations. | | | |
| XIXB | Identifies professional organizations available to people in business. | | | |
| XXA-B | Explains the determination and reduction of risks through the use of marketing research. | | | |
| XXC-D | Explains the manner in which business problems are identified and solved. | | | |
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| PROFICIENCY RATING | |
|---|---|
| **Scale Value** | **Definition** |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

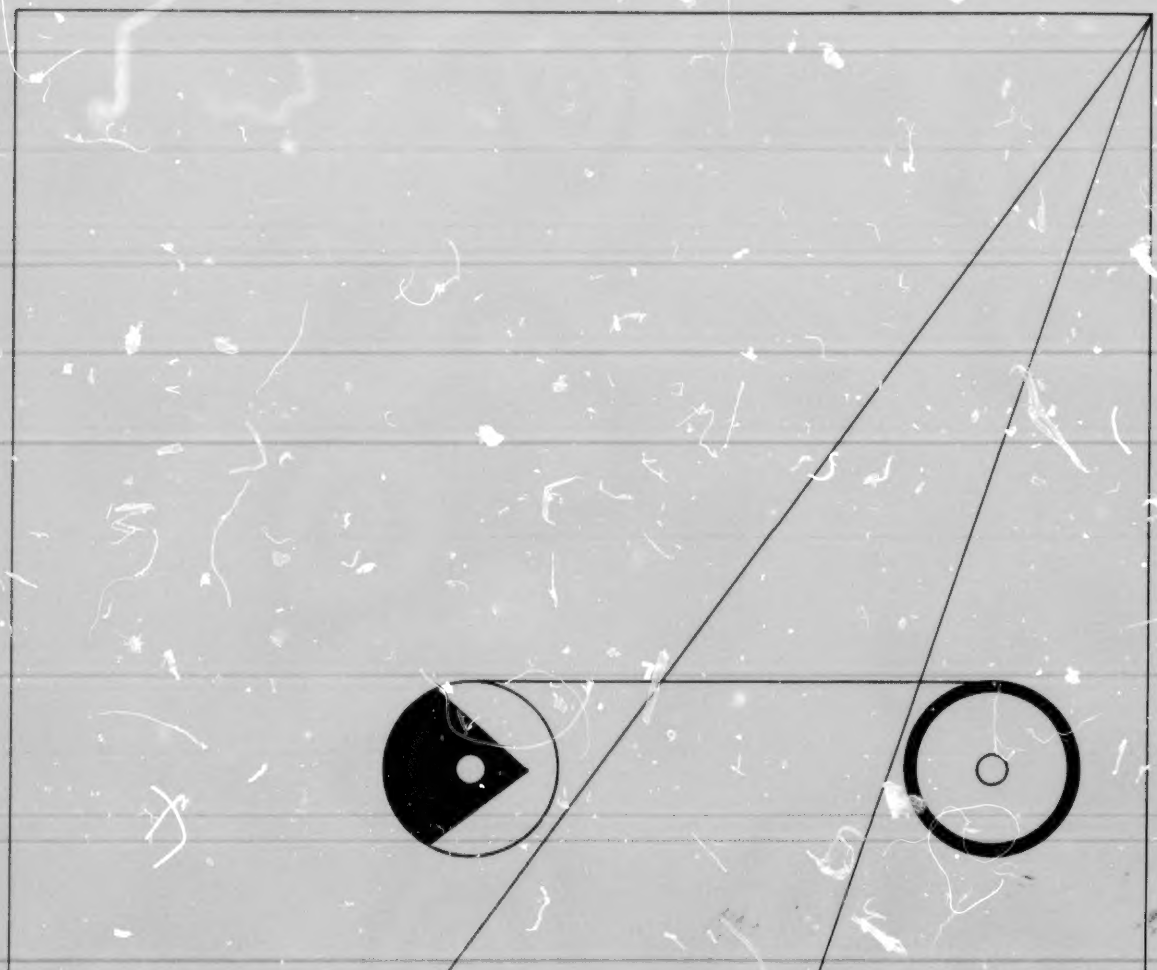
In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________



# BUSINESS
# DATA PROCESSING I

## BUSINESS DATA PROCESSING I

### Description

This course is designed to prepare students for entry-level occupations in business data processing. Students examine careers in data processing, study the development of data systems, view components of automated systems, and have hands-on experience with some type of computer system, including data-entry and peripheral equipment operation.

### Purpose

The purpose of this course is to provide the skills and knowledge necessary for students to gain entry-level employment in the computer data processing field.

## COURSE OUTLINE – BUSINESS DATA PROCESSING I

I. Introduction to Business Data Processing

- A. History of computing devices
- B. Need for and users of data processing
- C. Data manipulations – collection, input, processing, output, storage
- D. Equipment – calculator, data-entry device, collator, verifier
- E. Computer languages
- F. Computer hardware and software
- G. Numbering systems
- H. Flowcharting
- I. Disk concepts
- J. Data processor's attributes
- K. Careers in data processing

II. Basic Machine Operations

- A. Terminology
- B. Features and functions
- C. Operating procedures
- D. Numeric and alphabetic keying
- E. Duplication
- F. Verification

III. Advanced Machine Operations

- A. Program planning
- B. Data insertion
- C. Data deletion
- D. Data transfer

IV. Machine Simulations or Exercises

- A. Invoices
- B. Payrolls
- C. Inventories
- D. Coding exercises
- E. Master files
- F. Transaction files

V. Introductory Computer System Training

- A. Terminology
- B. Data processing concepts and systems
- C. Data organization
- D. Operator responsibilities

VI. Systems Overview

- A Identification of system components
- B. Purposes of components

## COURSE OUTLINE – BUSINESS DATA PROCESSING I

VII. Systems Operations

- A. Operational mode
- B. Action messages
- C. Log book

VIII. System Components

- A. Keyboard features
- B. Input media
- C. Central Processing Unit (CPU)
- D. Output media

IX. Keyboard Operation

- A. Command keys
- B. Program execution
- C. Corrections

## COMPETENCIES – BUSINESS DATA PROCESSING I

The student is required to demonstrate the following competencies in order to complete successfully Business Data Processing I.

IA 1. List ten people and events in the evolution of computing.

IB 2. Describe users of data processing equipment.

IB 3. Define the need for data processing today.

IC 4. Prepare five source documents for keying.

IC 5. Design the layout for a card, screen, or diskette.

IC 6. Examine computer printouts for errors.

ID 7. Extend the total cost for each item on ten invoices.

ID 8. Prepare a payroll master file on cards, diskette, cathrode ray tube (CRT), or disc.

ID 9. Arrange biographical sketches into a booklet.

IE 10. Recognize FORTRAN, COBOL, RPGII, and BASIC programming languages.

IF 11. List five examples of computer hardware and software.

IG 12. Write 20 numbers using the binary numbering system.

IH 13. Draw a flowchart.

II 14. Locate fields, records, and files.

IJ 15. Evaluate your work habits.

IJ 16. Describe a data processor.

IK 17. Prepare an index card for each job area of data processing showing the necessary training and salary range for each.

IIA 18. Complete statements relating to data-entry devices.

IIB 19. Label a diagram of the components of a computer system.

IIC 20. Respond to error messages.

IID 21. Key alpha and numeric data on a data-entry device.

IID 22. Add a record to a file.

IID 23. Delete a record from a file.

IID 24. Transfer a record in a file to a new location in the file.

| | | |
|---|---|---|
| IIE | 25. | Duplicate a file. |
| IIE | 26. | Copy a program from one input medium to another. |
| IIF | 27. | Verify keyed or punched data and make necessary corrections. |
| IIIA | 28. | Plan and activate programs for volume work. |
| IIIB | 29. | Insert a record. |
| IIIC | 30. | Delete a record. |
| IIID | 31. | Transfer a record. |
| IVA–F | 32. | Key or punch six different types of machine exercises. |
| VA–B | 33. | Label and explain each component of a computer system. |
| VC | 34. | Create a field, record, and file. |
| VD | 35. | Prepare a supplies list for data-entry operators. |
| VD | 36. | Insert paper into the printer. |
| VD | 37. | Rank job activities according to priority. |
| VD | 38. | Change the ribbon on a printer. |
| VIA | 39. | Label a diagram of the components of a computer system. |
| VIB | 40. | Complete statements relating to data-entry devices. |
| VIIA | 41. | Activate the computer or data-entry device. |
| VIIB | 42. | Respond to error messages. |
| VIIC | 43. | Locate items in a log or run book. |
| VIIIA | 44. | Operate function and command keys. |
| VIIIB | 45. | Prepare input for a computer (cards, tape, or disk). |
| VIIIC | 46. | List the processing steps for a central processing unit (CPU). |
| VIIID | 47. | Examine output from a computer. |
| IXA | 48. | Use command keys for several machine operations. |
| IXB | 49. | Terminate program execution. |
| IXC | 50. | Debug a program. |

## OBJECTIVES – BUSINESS DATA PROCESSING I

IA 1. Given a list of important people and inventions, arrange these people and inventions in chronological order with 100% accuracy.

IB 2. Given a list of data processing equipment users, correctly match the user to the appropriate piece of equipment.

IB 3. Given necessary information, explain the reason that a computer is needed in today's society by outlining five basic needs accurately.

IC 4. Given five blank source documents and one sample document, correctly fill in the missing parts on the blank documents.

IC 5. Given a blank card screen or diskette layout form and one sample layout, accurately prepare a layout for input.

IC 6. Given ten types of computer printouts with errors, locate and correct each error.

ID 7. Given ten incomplete invoices and a calculator, correctly complete the total column for each item on the invoice.

ID 8. Given the name, address, exemptions, and pay rate for each employee of a company, prepare an accurate payroll master file for that company.

ID 9. Using a collator and copies of biographical sketches of famous persons and inventions in data processing, correctly assemble a booklet.

IE 10. Given copies of completed computer coding sheets, correctly label which programming language was used for that program.

IF 11. Given pictures of computer hardware and software, correctly identify which items are hardware and which are software.

IG 12. Given a list of 20 decimal system numbers, accurately convert these numbers into the binary numbering system.

IH 13. Given a flowchart template and a specific situation, correctly draw a flowchart for that situation.

II 14. Given a data processing file, locate specified fields and records in that file.

IJ 15. Given a checklist of attributes for office workers, check whether each attribute does or does not apply to them.

IJ 16. Using a checklist of attributes for office workers, check those qualities that show distinguishing traits for a data processor.

IK 17. Using the *Dictionary of Occupational Titles,* prepare an index card which accurately lists salary and training necessary for jobs relating to a career in data processing.

## OBJECTIVES – BUSINESS DATA PROCESSING I

IIA 18. Given statements relating to data-entry devices, correctly fill in the answers.

IIB 19. Given a diagram of a computer system, correctly identify each part.

IIC 20. Given a simulated or real machine breakdown, use reference manuals appropriately to solve the problem.

IID 21. Provided with a data-entry device and exercises, key or punch data for the computer with 100% accuracy.

IID 22. Given a data processing file, key or punch a new record to add to the file with 100% accuracy.

IID 23. Given a data processing file, delete the fifth record from the file.

IID 24. Given a data processing file, move a record from one position to a new position.

IIE 25. Given a data processing file, duplicate that file entirely by an automated process.

IIE 26. Given a card deck or diskette, duplicate this data with 100% accuracy.

IIF 27. Given a job instruction sheet and a printout, analyze data on the printout for completeness, appearance, and useability.

IIIA 28. Given a source document and key entry specifications, prepare a data-entry program for automatic operation. The program must be 100% accurate.

IIIB 29. Given a data file, add a record with 100% accuracy.

IIIC 30. Given a data file, delete a record with 100% accuracy.

IIID 31. Given a data file, transfer a record with 100% accuracy.

IVA 32. Given a source document and key-entry specifications for invoices, key or punch an invoice file with 100% accuracy.

IVB 33. Given a source document with key-entry specifications for payrolls, key or punch a payroll file with 100% accuracy.

IVC 34. Given a source document and key-entry specifications for inventories, key or punch an inventory file with 100% accuracy.

IVD 35. Given the coding sheets and keying instructions for a computer program, key a computer program with 100% accuracy.

IVE 36. Given a file layout and a list of all students in the class, prepare a complete master student file.

## OBJECTIVES – BUSINESS DATA PROCESSING I

IVF 37. Given a printout of a master file and the file layout, completely update, delete, and correct a record in the file.

VA–B 38. Given a diagram of a data-entry device, label the input and output units with 100% accuracy.

VC 39. Given job specifications and keying instructions, accurately design a field, a record, and a file.

VD 40. Given a schedule of computer activities for a month, prepare an accurate list of supplies needed for each job.

VD 41. Provided with a printer, correctly change form paper and ribbon.

VD 42. Given a schedule of jobs to be run during the week, record due-in and due-out dates in the log book with 100% accuracy.

VD 43. Given a schedule of data-entry jobs, information concerning the volume of transactions, and due dates, assign priority levels to each activity using appropriate techniques.

VIA 44. Given a diagram of a computer system, correctly identify each part.

VIB 45. Given statements relating to various input and output devices, correctly fill in the answers.

VIIA 46. Given access to a computer or data-entry device, power up the central processing unit (CPU) correctly.

VIIB 47. Given a possible error message for a computer, consult a reference book to correct the error.

VIIC 48. Given a run book, determine the required files and the sequential steps which must be performed in order to run the job.

VIIIA 49. Given a specific system function, operate the command keys that will cause the function to be performed accurately.

VIIIA 50. Given some data, use function keys to enter the data correctly.

VIIIB 51. Given computer printouts, locate all appearance and syntax errors.

VIII C–D 52. Given a list of processing steps by the central processing unit (CPU), arrange these steps in correct order by logic sequence.

IXA 53. Given specific types of data, use the correct function key to enter the data correctly.

IXB 54. Given an operative computer program, terminate program execution using the correct function key.

IXC 55. Given a computer program containing errors, correct program syntax errors.

# BUSINESS DATA PROCESSING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Lists ten people and events in the evolution of computing. | | | |
| IB | Describes users of data processing equipment. | | | |
| IB | Defines the need for data processing today. | | | |
| IC | Prepares five source documents for keying. | | | |
| IC | Designs the layout for a card, screen, or diskette. | | | |
| IC | Examines computer printouts for errors. | | | |
| ID | Extends the total cost for each item on ten invoices. | | | |
| ID | Prepares a payroll master file on cards, diskette, cathrode-ray tube (CRT), or disc. | | | |
| ID | Arranges biographical sketches into a booklet. | | | |
| IE | Recognizes FORTRAN, COBAL, RPGII, and BASIC programming languages. | | | |
| IF | Lists five examples of computer hardware and software. | | | |

# BUSINESS DATA PROCESSING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IG | Writes 20 numbers using the binary numbering system. | | | |
| IH | Draws a flowchart. | | | |
| II | Locates fields, records, and files. | | | |
| IJ | Evaluates his/her work habits. | | | |
| IJ | Describes a data processor. | | | |
| IK | Prepares an index card for each job area of data processing showing the necessary training and salary range for each. | | | |
| IIA | Completes statements relating to data-entry devices. | | | |
| IIB | Labels a diagram of the components of a computer system. | | | |
| IIC | Responds to error messages. | | | |
| IID | Keys alpha and numeric data on an data-entry device. | | | |
| IID | Adds a record to a file. | | | |

## BUSINESS DATA PROCESSING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IID | Deletes a record from a file. | | | |
| IID | Transfers a record in a file to a new location in the file. | | | |
| IIE | Duplicates a file. | | | |
| IIE | Copies a program from one input medium to another. | | | |
| IIF | Verifies keyed or punched data and makes necessary corrections. | | | |
| IIIA | Plans and activates programs for volume work. | | | |
| IIIB | Inserts a record. | | | |
| IIIC | Deletes a record. | | | |
| IIID | Transfers a record. | | | |
| IVA-F | Keys or punches six different types of machine exercises. | | | |
| VA-B | Labels and explains each component of a computer system. | | | |

## BUSINESS DATA PROCESSING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VC | Creates a field, record, and file. | | | |
| VD | Prepares a supplies list for data-entry operators. | | | |
| VD | Inserts paper into the computer. | | | |
| VD | Ranks job activities according to priority. | | | |
| VD | Changes the ribbon on a printer. | | | |
| VIA | Labels a diagram of the components of a computer system. | | | |
| VIB | Completes statements relating to data-entry devices. | | | |
| VIIA | Activates the computer or data-entry device. | | | |
| VIIB | Responds to error messages. | | | |
| VIIC | Locates items in a log or run book. | | | |
| VIIIA | Operates function and command keys. | | | |

## BUSINESS DATA PROCESSING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIIIB | Prepares input for a computer (cards, tape, or disk). | | | |
| VIIIC | Lists the processing steps for a central processing unit (CPU). | | | |
| VIIID | Examines output from a computer. | | | |
| IXA | Uses command keys for several machine operations. | | | |
| IXB | Terminates program execution. | | | |
| IXC | Debugs a program. | | | |
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| PROFICIENCY RATING | |
|---|---|
| **Scale Value** | **Definition** |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

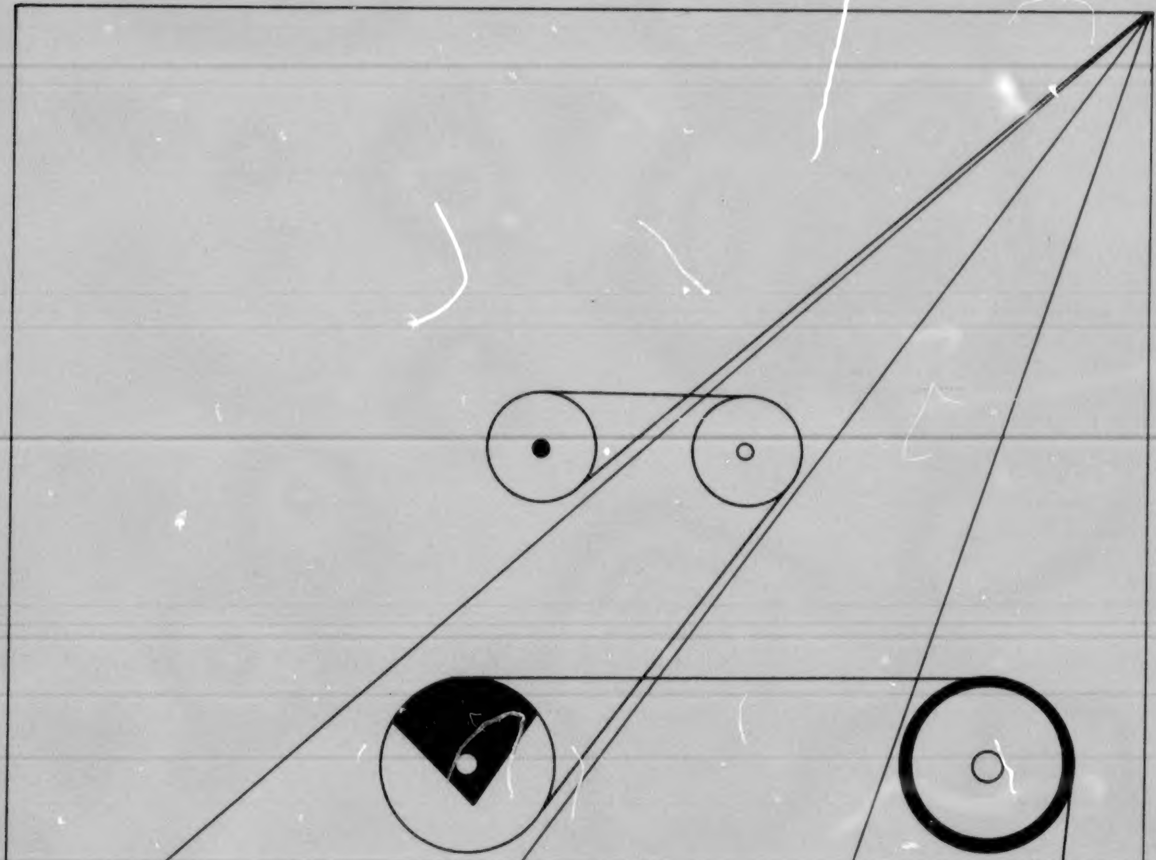
In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________



# BUSINESS DATA PROCESSING II

# BUSINESS DATA PROCESSING II

## Description

This course is designed to place emphasis on electronic data processing and writing programs. Various programming languages will be taught depending on the available type of equipment. As a part of the course, hands-on operation of computer systems is stressed.

## Purpose

The purpose of this course is to provide students with the necessary skills to understand and use program languages, to develop logical thinking through the preparation of flowcharts, and to relate accounting skills to electronic data processing systems.

# COURSE OUTLINE – BUSINESS DATA PROCESSING II

I. Computer Systems

  A. Digital computers
  B. Analog computers
  C. Input/output equipment
  D. Central processing units

II. Documentation

  A. Flowcharts
  B. Record layouts
  C. Print charts

III. Programming Fundamentals

  A. Disk concepts
    1. File types
    2. Access methods
    3. Indicators
  B. Coding sheets
  C. Desk checking

IV. Computer Programming

  A. Problem analysis
  B. Documentation
  C. Coding
  D. Debugging syntax errors
  E. Maintenance

V. Programming Applications

  A. Lists
  B. Accounts receivable
  C. Inventory
  D. Payroll
  E. Future Business Leaders of America (FBLA)

# COMPETENCIES – BUSINESS DATA PROCESSING II

The student is required to demonstrate the following competencies in order to complete successfully Business Data Processing II.

IA–B 1. Label pictures of computing machines according to use.

IC 2. List operating procedures for data-entry and computer devices.

ID 3. List the processing methods needed for particular types of files and programs.

IIA 4. Draw flowcharts showing logic of a computer program.

IIB–C 5. Code record layouts, print charts, and specification sheets for each program.

IIIA 6. Recognize file types, file access methods, and indicators for a high-level programming language.

IIIB 7. Prepare computer coding sheets for a computer program.

IIIC 8. Prepare test data to desk check a computer program.

IVA 9. Analyze a given problem and determine, by flowcharting, the best possible method of completing the job.

IVB 10. Prepare the appropriate type of documentation for each program written.

IVC 11. Code a computer program using an appropriate business computer language.

IVD 12. Correct program syntax errors.

IVE 13. Add, update, and delete computer programs to an existing program file.

VA–E 14. Analyze, document, code, and correct computer programs using an appropriate business computer language for five different types of business applications.

## OBJECTIVES – BUSINESS DATA PROCESSING II

IA–B 1. Given several pictures of computing devices, correctly label the digital computers and the analog computers.

IC 2. Given a list of operating procedures for data-entry and computer devices, arrange these procedures in correct chronological order.

ID 3. Given a list of three types of processing methods, correctly match the type of processing needed for the type of file and program used.

IIA 4. Given a job specification sheet, accurately prepare a logic sequence in flowchart form for coding a program.

IIB–C 5. Given the appropriate forms for designing and coding, accurately prepare the necessary layouts and specification sheets for each computer program written.

IIIA 6. Given a table of file types, correctly match the file type to the most appropriate method of access.

IIIA 7. Given a computer program, accurately code indicator controls on the program.

IIIB 8. Given program specifications, code logical solutions on the appropriate type of coding sheets.

IIIC 9. Given a program with errors, write test data to desk check and correct that program.

IVA 10. Given a programming job specification sheet, draw a flowchart which illustrates accurately the logical sequences in a program.

IVB 11. Given the proper documentation form and job specifications, accurately code the necessary documentation for a computer program.

IVC 12. Given program specifications, 1/0 record layouts, flowchart, and coding sheets, accurately prepare an application program using a high-level computer language.

IVD 13. Given a computer program with errors, accurately debug the program.

IVE 14. Given a file of various computer programs and program job specification sheets, correctly add, update, or delete a program or sections of a program in the computer file.

VA–E 15. Given specific business applications and job specification sheets, accurately analyze, document, code, and debug business application programs.

## BUSINESS DATA PROCESSING II CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA-B | Labels pictures of computing machines according to use. | | | |
| IC | Lists operating procedures for data-entry and computer devices. | | | |
| ID | Lists the processing methods needed for particular types of files and programs. | | | |
| IIA | Draws flowcharts showing logic of a computer program. | | | |
| IIB-C | Codes record layouts, print charts, and specification sheets for each program. | | | |
| IIIA | Recognizes file types, file access methods, and indicators for a high-level programming language. | | | |
| IIIB | Prepares computer coding sheets for a computer program. | | | |
| IIIC | Prepares test data to desk check a computer program. | | | |
| IVA | Analyzes a given problem and determines, by flowcharting, the best possible method of completing the job. | | | |
| IVB | Prepares the appropriate type of documentation for each program written. | | | |
| IVC | Codes a computer program using an appropriate business computer language. | | | |

## BUSINESS DATA PROCESSING II CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IVD | Corrects program syntax errors. | | | |
| IVE | Adds, updates, and deletes computer programs to an existing program file. | | | |
| VA-E | Analyzes, documents, codes, and corrects computer programs using an appropriate business computer language for five different types of business applications. | | | |
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| PROFICIENCY RATING | |
|---|---|
| Scale Value | Definition |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

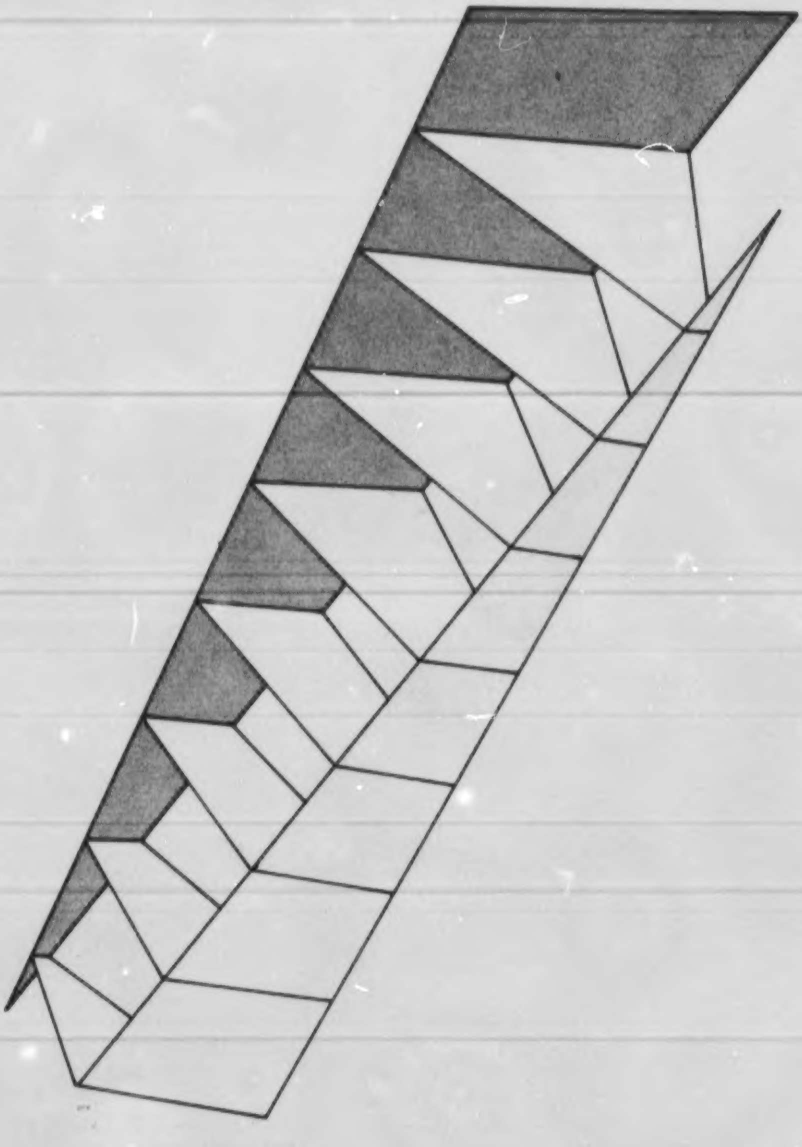
In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________



# INTRODUCTION TO BUSINESS

## INTRODUCTION TO BUSINESS

### Description

This course is designed for students interested in learning about the free enterprise system. The course content should be based on contemporary issues and on the needs of the student and the community.

### Purpose

The purpose of this course is to provide students with the information needed to select and utilize goods and services as well as to become competent in the management of their personal and financial resources. An understanding of the American free enterprise system and an appreciation of its role in our economic society are fundamental themes of this course. An orientation in business careers is interwoven within the course content.

# COURSE OUTLINE – INTRODUCTION TO BUSINESS

I. Business and Our Economic System

  A. Organizing for business
  B. Producing goods and services
  C. Marketing goods and services
  D. Comparing economic systems
  E. Characterizing a free enterprise system

II. Consumer Awareness

  A. Locating and using sources of consumer information
  B. Becoming a wise consumer

III. Money Management

  A. Managing your money wisely
    1. Setting personal economic goals
    2. Budgeting income
    3. Saving money
    4. Spending money
  B. Changing values of money
    1. Inflation
    2. Deflation

IV. Bank Services

  A. Opening and using a checking account
  B. Opening and using a savings account
  C. Writing checks (including stub and register)
  D. Endorsing checks
  E. Depositing cash, checks, and other items
  F. Making payments by other means

V. Credit Use

  A. Buying on credit
  B. Computing cost of credit
  C. Deciding whether to use credit
  D. Obtaining a loan

VI. Insurance Protection

  A. Buying life insurance
  B. Buying auto insurance
  C. Buying health insurance
  D. Buying income security insurance
  E. Buying home and property insurance

## COURSE OUTLINE – INTRODUCTION TO BUSINESS

VII. Government Services

- A. Sharing government benefits
  - 1. Highways
  - 2. Schools
  - 3. Libraries
  - 4. Fire protection
  - 5. Police protection
  - 6. Parks
  - 7. Airports
  - 8. Courts of law
  - 9. National defense
  - 10. Welfare systems
- B. Sharing government expenses
  - 1. Income tax
  - 2. Property tax
  - 3. Sales tax
  - 4. Excise tax
  - 5. Import tax
  - 6. Inheritance tax
  - 7. Estate tax
  - 8. Gift tax

VIII. Labor Unions

- A. Recognizing advantages
- B. Recognizing disadvantages

IX. Career Outlook

- A. Surveying business occupations
- B. Surveying personal interests
- C. Noting trends and innovations in business careers

## COMPETENCIES – INTRODUCTION TO BUSINESS

The student is required to demonstrate the following competencies in order to complete successfully Introduction to Business.

| | | |
|---|---|---|
| IA | 1. | Identify business organizations. |
| IB | 2. | Identify factors of production. |
| IC | 3. | Identify functions of marketing. |
| ID | 4. | Compare economic systems. |
| IE | 5. | Characterize a free enterprise system. |
| IIA | 6. | Identify sources of consumer information. |
| IIB | 7. | Characterize a wise consumer. |
| IIIA | 8. | Set personal economic goals. |
| IIIA | 9. | Prepare a budget. |
| IIIA | 10. | Compare methods of saving money. |
| IIIA | 11. | Prepare a plan for spending money. |
| IIIB | 12. | Compare inflation and deflation. |
| IVA | 13. | Open a checking account. |
| IVB | 14. | Open a savings account. |
| IVC | 15. | Complete checks, stubs, and register. |
| IVD | 16. | Endorse checks. |
| IVE | 17. | Deposit cash, checks, and other items. |
| IVF | 18. | Identify other means of making payments. |
| VA | 19. | Complete credit application forms. |
| VB | 20. | Compute cost of credit. |
| VC | 21. | Decide whether or not to use credit. |
| VD | 22. | Complete loan application. |
| VIA | 23. | Identify the merits of life insurance. |
| VIB | 24. | Identify the merits of auto insurance. |

# COMPETENCIES – INTRODUCTION TO BUSINESS

| | | |
|---|---|---|
| VIC | 25. | Identify the merits of health insurance. |
| VID | 26. | Identify the merits of income security insurance. |
| VIE | 27. | Identify the merits of home and property insurance. |
| VIIA | 28. | Identify government benefits. |
| VIIB | 29. | Identify government expenses. |
| VIIIA-B | 30. | List advantages and disadvantages of labor unions. |
| IXA | 31. | Survey business occupations. |
| IXB | 32. | Survey personal interests. |
| IXC | 33. | Identify trends and innovations in business careers. |

## OBJECTIVES – INTRODUCTION TO BUSINESS

| | | |
|---|---|---|
| IA | 1. | Given a list of various characteristics of business organizations, accurately classify each according to proprietorship, partnership, corporation, or cooperatives. |
| IB | 2. | Given 15 factors of production, accurately determine which items are considered natural resources, capital resources, or human resources. |
| IC | 3. | Given 25 functions of marketing, accurately determine which items are considered processing, packaging, storing, transporting, or advertising. |
| ID | 4. | Given a list of advantages and disadvantages of three economic systems, correctly classify each item as capitalism, communism, or socialism. |
| IE | 5. | Given ten items that might describe a free enterprise system, accurately select those that characterize a free enterprise system. |
| IIA | 6. | Given a list of 20 information sources, identify the sources of reliable consumer information. |
| IIB | 7. | Given a list of 20 consumer traits, identify the distinguishing traits of a wise consumer. |
| IIIA | 8. | Given a sheet of paper containing two columns entitled "Needs" and "Wants," write five items considered essential needs for survival and five items considered as wants (nice to have). Items must agree with instructor's key. |
| IIIA | 9. | Given a list of 20 items and an income and expense record, prepare a budget for a one-week period. Budget must reflect reasonable expenditures, include a savings plan, and not exceed $200. |
| IIIA | 10. | Given three items to purchase, various descriptions and costs, and a budget, use comparison shopping and purchase the most appropriate items for the budget. Selection must agree with instructor's key. |
| IIIA | 11. | Given a list of ten terms, correctly classify each term as pertaining to inflation or deflation. |
| IVA-B | 12. | Given a blank customer signature card and a case description, open a checking and a savings account. The signature card must be completely accurate. |
| IVC | 13. | Given ten amounts of money and respective payees, complete appropriate checks, stubs, and registers accurately. |
| IVD | 14. | Given ten checks and ten case descriptions, endorse each check. Each endorsement must be appropriate for the situation. |
| IVE | 15. | Given a blank deposit slip and a case description, prepare a deposit slip with 100% accuracy. |

## OBJECTIVES – INTRODUCTION TO BUSINESS

IVF 16. Given five case descriptions, determine the preferred means for making a payment other than a check.

VA,D 17. Given five case descriptions, determine the preferred type and source of credit use. Complete the appropriate credit application forms (eg. loan, sales, installment, and noninstallment credit).

VB 18. Given the loan amount of ten items, various interest rates, and maturity dates, accurately calculate the cost of credit for each item.

VC 19. Given ten case descriptions and budget information, decide whether or not to purchase items using credit. Decisions must agree with instructor's key.

VIA–E 20. Given ten case descriptions and a listing of the various types of life, home, health, auto, and income insurance, match the appropriate types of insurance to the needs of the various individuals described in each case. Decisions must agree with instructor's key.

VIIA 21. Given a list of 15 services, accurately identify those which are government benefits.

VIIB 22. Given a list of eight types of taxes and eight definitions, correctly match each tax to its appropriate definition.

VIIIA-B 23. List three advantages and three disadvantages of labor unions accurately.

IXA,C 24. Given current occupational information and trends for 20 occupations, list in order the top ten occupations for the next decade.

IXB 25. Given a list of five jobs, describe three ways in which satisfaction is derived from each job.

## INTRODUCTION TO BUSINESS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Identifies business organizations. | | | |
| IB | Identifies factors of production. | | | |
| IC | Identifies functions of marketing. | | | |
| ID | Compares economic systems. | | | |
| IE | Characterizes a free enterprise system. | | | |
| IIA | Identifies sources of consumer information. | | | |
| IIB | Characterizes a wise consumer. | | | |
| IIIA | Sets personal economic goals. | | | |
| IIIA | Prepares a budget. | | | |
| IIIA | Compares methods of saving money. | | | |
| IIIA | Prepares a plan for spending money. | | | |

## INTRODUCTION TO BUSINESS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IIIB | Identifies inflation and deflation values. | | | |
| IVA | Opens a checking account. | | | |
| IVB | Opens a savings account. | | | |
| IVC | Completes checks, stubs, and registers. | | | |
| IVD | Endorses checks. | | | |
| IVE | Deposits cash, checks, and other items. | | | |
| IVF | Identifies other means of making payments. | | | |
| VA,D | Completes credit application forms. | | | |
| VB | Computes cost of credit. | | | |
| VC | Decides whether or not to use credit. | | | |
| VIA | Identifies the merits of life insurance. | | | |

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## INTRODUCTION TO BUSINESS CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIB | Identifies the merits of auto insurance. | | | |
| VIC | Identifies the merits of health insurance. | | | |
| VID | Identifies the merits of income security insurance. | | | |
| VIE | Identifies the merits of home and property insurance. | | | |
| VIIA | Identifies government benefits. | | | |
| VIIB | Identifies government expenses. | | | |
| VIIIA-B | Lists advantages and disadvantages of labor unions. | | | |
| IXA,C | Surveys business occupations. | | | |
| IXB | Surveys personal interests. | | | |
| | | | | |
| | | | | |

## PROFICIENCY RATING

| Scale Value | Definition |
|---|---|
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

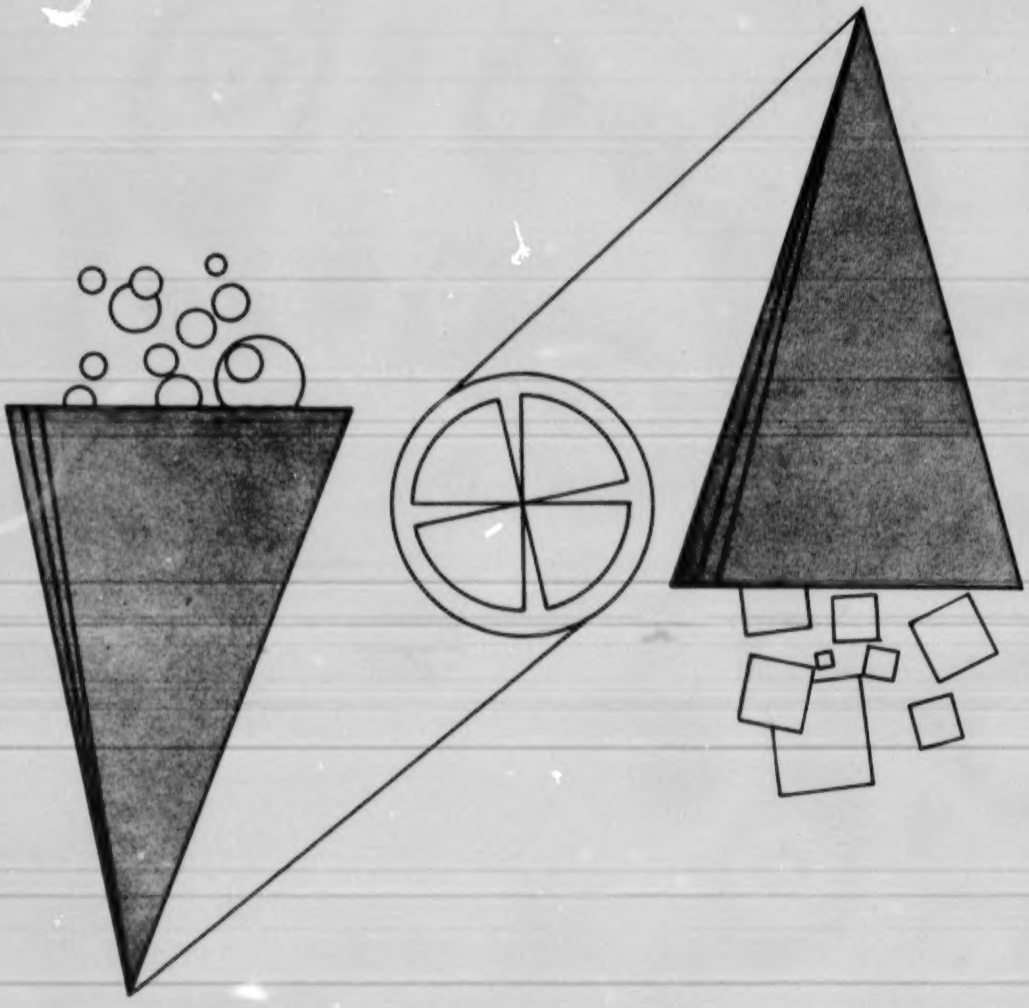
In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________



# MACHINE DICTATION AND TRANSCRIPTION

# MACHINE DICTATION AND TRANSCRIPTION

## Description

This course is designed to place major emphasis on mailable transcription from prerecorded documents. Correct techniques for dictation of documents for transcription are included.

## Purpose

The purpose of this course is to provide students with an opportunity to apply their language skills, proofreading skills, and keyboarding efficiency through the transcription of documents from prerecorded media. Students are given the opportunity to learn proper techniques for composing and dictating effective documents.

## COURSE OUTLINE – MACHINE DICTATION AND TRANSCRIPTION

I. Preview of Language Skills

- A. Punctuation
- B. Spelling
- C. Capitalization
- D. Grammar

II. Keyboarding Procedures

- A. Review of typewriter parts
- B. Style and format of documents
    1. Letters
    2. Memoranda
    3. Manuscripts
    4. Statistical information
    5. Reports

III. Transcribing Procedures

- A. Operation of transcribing equipment
- B. Listening skills
- C. Keyboarding techniques
- D. Use of reference material
- E. Proofreading

IV. Transcription Practice

- A. Word lists
- B. Sentences
- C. Paragraphs
- D. Letters
- E. Miscellaneous documents

V. Review of Document Composition

- A. Sentences
- B. Paragraphs
- C. Letters
- D. Memoranda
- E. Reports

VI. Dictation Procedures

- A. Operation of dictation equipment
- B. Proper dictation techniques
- C. Follow-up procedures

# COURSE OUTLINE – MACHINE DICTATION AND TRANSCRIPTION

VII. Dictation Practice

A. Dictating sentences
B. Dictating paragraphs
C. Developing document outlines
D. Dictating letters
E. Dictating miscellaneous documents

## COMPETENCIES – MACHINE DICTATION AND TRANSCRIPTION

IA 1. Demonstrate the ability to punctuate correctly.

IB 2. Demonstrate the ability to spell correctly.

IC 3. Demonstrate the ability to use capitalization correctly.

ID 4. Demonstrate grammatical correctness through the origination of documents.

IIA 5. Demonstrate correct usage of typewriter parts.

IIB 6. Demonstrate ability to use correct style and format for documents.

IIIA 7. Identify transcription/dictation equipment parts.

IIIB 8. Demonstrate transcription procedures including listening techniques.

IIIC 9. Demonstrate keyboarding techniques.

IIID 10. Demonstrate ability to use reference books.

IIIE 11. Demonstate ability to proofread.

IVA–E 12. Transcribe dictated material.

VA–E 13. Compose sentences, paragraphs, letters, memoranda, and reports.

VIA 14. Describe function of transcription/dictation equipment parts.

VIB 15. Dictate prepared letter using correct dictation techniques.

VIC 16. Perform necessary follow-up procedures.

VIIA 17. Dictate sentences.

VIIB 18. Dictate paragraphs.

VIIC–E 19. Develop short outlines and dictate a letter and miscellaneous documents.

## OBJECTIVES – MACHINE DICTATION AND TRANSCRIPTION

IA 1. Given ten sentences, insert correct punctuation.

IB 2. Given a spelling test, type words from dictation with 95% accuracy.

IC 3. Given five documents, insert correct capitalization.

ID 4. Given ten sentences with grammatical errors, make appropriate corrections.

IIA 5. Given a checklist of typewriter parts, accurately identify each part and its function.

IIB 6. Given unarranged letters, memoranda, manuscripts, statistical information, and reports, arrange documents in correct style and format.

IIIA 7. Given a diagram of transcription/dictation equipment parts, correctly identify each part.

IIIB 8. Given a document, accurately demonstrate transcription procedures including listening techniques.

IIIC 9. Given one document, demonstrate correct keyboarding techniques according to suggested typewriting textbook.

IIID 10. Given a list of reference activities, correctly select the appropriate reference book and locate the required information.

IIIE 11. Given a document containing numerous errors, proofread and type correctly.

IVA–C 12. Given cassettes/belts with dictated word lists, sentences, and paragraphs, accurately transcribe into acceptable copy.

IVD–E 13. Given cassettes/belts with dicated letters and miscellaneous documents, accurately transcribe into mailable copy.

VA 14. Given ten questions, compose appropriate answers using correct sentence structure.

VB 15. Given five business situations, correctly compose an acceptable paragraph for each situation.

VC 16. Given two letters, correctly compose an acceptable response to each.

VD 17. Given a business situation, correctly compose an acceptable memorandum.

VD 18. Given a business situation, correctly compose an acceptable report.

VIA 19. Given a list of dictation/transcription equipment parts, correctly describe the function of each part.

## OBJECTIVES – MACHINE DICTATION AND TRANSCRIPTION

VIB 20. Given a checklist of proper dictation techniques and a letter, accurately demonstrate the ability to incorporate correct techniques through dictation of the letter.

VIC 21. Given a checklist for follow-up procedures, perform each procedure satisfactorily.

VIIA 22. Given ten questions, accurately dictate appropriate answers using correct sentence structure.

VIIB 23. Given five business situations, accurately dictate an acceptable paragraph for each situation.

VIIC-E 24. Given a letter and two miscellaneous documents, correctly develop a short outline and dictate an acceptable response to each.

# MACHINE DICTATION AND TRANSCRIPTION CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Demonstrates the ability to punctuate correctly. | | | |
| IB | Demonstrates the ability to spell correctly. | | | |
| IC | Demonstrates the ability to use capitalization correctly. | | | |
| ID | Demonstrates grammatical correctness through the origination of documents. | | | |
| IIA | Demonstrates correct usage of typewriter parts. | | | |
| IIB | Demonstrates ability to use correct style and format for documents. | | | |
| IIIA | Identifies transcription/dictation equipment parts. | | | |
| IIIB | Demonstrates transcription procedures including listening techniques. | | | |
| IIIC | Demonstrates keyboarding techniques. | | | |
| IIID | Demonstrates ability to use reference books. | | | |
| IIIE | Demonstrates ability to proofread. | | | |

## MACHINE DICTATION AND TRANSCRIPTION CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IVA-E | Transcribes dictated material. | | | |
| VA-E | Composes sentences, paragraphs, letters, memoranda, and reports. | | | |
| VIA | Describes transcription/dictation equipment parts. | | | |
| VIB | Dictates prepared letter using correct dictation techniques. | | | |
| VIC | Performs necessary follow-up procedures. | | | |
| VIIA | Dictates sentences. | | | |
| VIIB | Dictates paragraphs. | | | |
| VIIC-E | Develops short outlines and dictates a letter and miscellaneous documents. | | | |
| | | | | |
| | | | | |
| | | | | |

## PROFICIENCY RATING

| Scale Value | Definition |
|---|---|
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

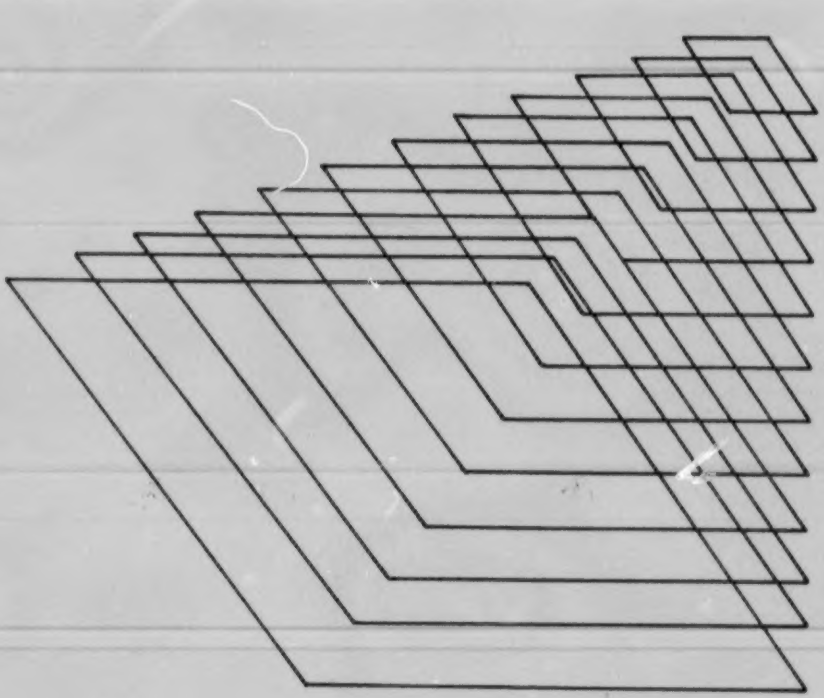
In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________



# OFFICE MACHINES

## OFFICE MACHINES

### Description

This course is designed to provide an introduction to commonly used office machines. The course also provides an opportunity to develop skill, speed, and accuracy on machines including electronic calculator, transcriber, photocopier, text-editing typewriter, micro computer, and data-entry device.

### Purpose

The purpose of this course is to provide the skills and knowledge of office machines necessary for employment in a business office.

# COURSE OUTLINE – OFFICE MACHINES

I. Electronic Calculator

- A. Demonstrating proficiency in addition, subtraction, multiplication, and division
- B. Using touch method
- C. Using correction methods
- D. Demonstrating use of decimals
- E. Using memory
- F. Using reciprocals
- G. Calculating business problems
- H. Operating machine with speed and accuracy

II. Transcription Machine

- A. Preparing machine for operational mode
- B. Operating cassette, belt, or disk machines
- C. Preparing mailable copies from tape

III. Duplication Processes

- A. Using various duplicating processes
- B. Preparing master
- C. Operating fluid duplicator
- D. Preparing stencil
- E. Operating ink duplicator
- F. Operating photocopier

IV. Data-Entry Device

- A. Operating data-entry device
- B. Keying alphabetic data
- C. Keying numeric data
- D. Verifying accuracy of work
- E. Designing a program for volume work

V. Micro Computer

- A. Defining four methods of data processing
- B. Defining basic operations involved in data processing
- C. Listing types of input media
- D. Listing types of input devices
- E. Identifying central processing unit functions
- F. Listing types of output devices
- G. Designing simple flowcharts
- H. Operating basic features of machine
- I. Loading continuous forms
- J. Adjusting paper alignment scale
- K. Activating a program

# COURSE OUTLINE – OFFICE MACHINES

VI. Text-Editing Typewriter

A. Listing functions of automated typewriters
B. Identifying types of keyboarding equipment
C. Identifying types of storage mediums
D. Identifying types of printers
E. Demonstrating text-editing features – key, edit, revise, store, retrieve, and play out copy

## COMPETENCIES – OFFICE MACHINES

The student is required to demonstrate the following competencies in order to complete successfully Office Machines.

IA 1. Add, subtract, multiply, and divide on electronic calculator.

IB 2. Use touch method of key control on electronic calculator.

IC 3. Use methods of correcting on electronic calculator.

ID 4. Calculate problems using decimals on electronic calculator.

IE 5. Operate memory on electronic calculator.

IF 6. Calculate problems using reciprocals on electronic calculator.

IG 7. Calculate business problems on electronic calculator.

IH 8. Operate electronic calculator with speed and accuracy.

IIA 9. Prepare transcription machine for use.

IIB 10. Operate transcription machine.

IIC 11. Prepare mailable copies from tape with speed and accuracy.

IIIA 12. Use various duplicating processes.

IIIB 13. Prepare master.

IIIC 14. Operate fluid duplicator.

IIID 15. Prepare stencil.

IIIE 16. Operate ink duplicator.

IIIF 17. Operate photocopier.

IVA 18. Operate data-entry device.

IVB 19. Key alphabetic data.

IVC 20. Key numeric data.

IVD 21. Verify accuracy of work.

IVE 22. Design a program for volume work.

VA 23. Define four methods of data processing.

VB 24. Define basic operations involved in data processing.

## COMPETENCIES – OFFICE MACHINES

VC 25. List types of input media.

VD 26. List types of input devices.

VE 27. Identify central processing unit functions.

VF 28. List types of output devices.

VG 29. Design simple flowcharts.

VH 30. Operate basic features of machine.

VI 31. Load continuous forms.

VJ 32. Adjust paper alignment scale.

VK 33. Activate a program.

VIA 34. List functions of automated typewriters.

VIB 35. Identify features of text-editing typewriters.

VIC 36. Identify types of storage mediums.

VID 37. Identify types of printers.

VIE 38. Demonstrate text-editing features.

## OBJECTIVES – OFFICE MACHINES

IA 1. Given access to an electronic calculator and ten problems, add, subtract, multiply, and divide accurately.

IB 2. Given ten problems, accurately use touch method of key control on electronic calculator.

IC 3. Given ten problems and instructions on proper correction methods, make accurate corrections on an electronic calculator using appropriate method.

ID 4. Given ten decimal problems and an electronic calculator, accurately complete calculations.

IE 5. Given ten business problems and an electronic calculator requiring use of memory, make calculations accurately.

IF 6. Given ten reciprocal problems and an electronic calculator, calculate accurately.

IG 7. Given ten business problems and an electronic calculator, calculate accurately.

IH 8. Given 40 problems and an electronic calculator, calculate accurately in 45 minutes.

IIA 9. Given a transcription machine, equipment, and tapes, prepare the machine for use. Machine must be operational within ten minutes.

IIB 10. Given a transcription machine and practice tapes, operate the machine and type 20 mailable letters.

IIC 11. Given a transcription tape, type three mailable documents in 45 minutes.

IIIA 12. Given data about various duplicating processes and specific information on the use of each duplicating process, accurately select the appropriate process for ten duplication jobs.

IIIB 13. Given an unarranged copy, prepare a master with all errors acceptably corrected.

IIIC 14. Given an unarranged copy, type master and duplicate 25 clear, corrected copies on a fluid duplicator.

IIID 15. Given unarranged copy, prepare a stencil with all errors acceptably corrected.

IIIE 16. Given a typed stencil, duplicate 25 clear, corrected copies on an ink duplicator.

IIIF 17. Given a typed document, make 25 clear, acceptable copies on photocopier.

IVA 18. Given an input device, design field layout for 20 problems and accurately enter data.

IVB 19. Given an input device, accurately key seven out of ten alphabetic exercises.

## OBJECTIVES – OFFICE MACHINES

IVC 20. Given an input device, accurately key ten numeric exercises.

IVD 21. Given access to a verifier or master file, compare 30 exercises for accuracy. All errors must be identified.

IVE 22. Given ten invoices, design a program to automatically duplicate, skip, and right adjust data for the invoices accurately.

VA 23. Given an essay-type test, define the four methods of data processing. All four methods must be included.

VB 24. Given an essay-type test, define basic data processing operations. All major operations must be included.

VC 25. Given a list of various types of media, correctly list five types of input media.

VD 26. Given a list of various types of data processing devices, correctly list five types of input devices.

VE 27. Given a diagram of the central processing unit and a list of explanations, correctly label the central processing unit components and match them to their respective functions.

VF 28. Given a list of various types of data processing devices, correctly list five types of output devices.

VG 29. Given a flowchart template and a case problem, correctly design a simple flowchart.

VH 30. Given a data processing simulation or a selected program, operate the equipment correctly using appropriate procedures.

VI 31. Given a printer, load continuous form paper correctly.

VJ 32. Given access to a computer, align the paper scale correctly.

VK 33. Given an operative program, demonstrate the ability to enter, execute, and terminate a program by correctly operating function and command keys.

VIA 34. Given reference materials, write a report on the functions of automated typewriters.

VIB 35. Given a diagram of a text-editing typewriter, correctly identify the basic features.

VIC 36. Given a list of internal and external storage mediums, correctly classify the two types of storage.

VID 37. Given pictures of various types of data processing equipment, correctly identify five printers.

VIE 38. Given a text-editing typewriter and unarranged copy, key, edit, revise, store, retrieve, and play out copy in mailable form.

## OFFICE MACHINES CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Adds, subtracts, multiplies, and divides on electronic calculator. | | | |
| IB | Uses touch method of key control on electronic calculator. | | | |
| IC | Uses methods of correcting on electronic calculator. | | | |
| ID | Calculates problems using decimals on electronic calculator. | | | |
| IE | Operates memory on electronic calculator. | | | |
| IF | Calculates problems using reciprocals on electronic calculator. | | | |
| IG | Calculates business problems on electronic calculator. | | | |
| IH | Operates electronic calculator with speed and accuracy. | | | |
| IIA | Prepares transcription machine for use. | | | |
| IIB | Operates transcription machine. | | | |
| IIC | Prepares mailable copies from tape with speed and accuracy. | | | |

## OFFICE MACHINES CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IIIA | Uses various duplicating processes. | | | |
| IIIB | Prepares master. | | | |
| IIIC | Operates fluid duplicator. | | | |
| IIID | Prepares stencil. | | | |
| IIIE | Operates ink duplicator. | | | |
| IIIF | Operates photocopier. | | | |
| IVA | Operates data-entry device. | | | |
| IVB | Keys alphabetic data. | | | |
| IVC | Keys numeric data. | | | |
| IVD | Verifies accuracy of work. | | | |
| IVE | Designs a program for volume work. | | | |

# OFFICE MACHINES CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VA | Defines four methods of data processing. | | | |
| VB | Defines basic operations involved in data processing. | | | |
| VC | Lists types of input media. | | | |
| VD | Lists types of input devices. | | | |
| VE | Identifies central processing unit functions. | | | |
| VF | Lists types of output devices. | | | |
| VG | Designs simple flowcharts. | | | |
| VH | Operates basic features of equipment. | | | |
| VI | Loads continuous forms. | | | |
| VJ | Adjusts paper alignment scale. | | | |
| VK | Activates a program. | | | |

## OFFICE MACHINES CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIA | Lists functions of automated typewriters. | | | |
| VIB | Identifies features of text-editing typewriters. | | | |
| VIC | Identifies types of storage mediums. | | | |
| VID | Identifies types of printers. | | | |
| VIE | Demonstrates text-editing features. | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

| PROFICIENCY RATING | |
|---|---|
| **Scale Value** | **Definition** |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________

# OFFICE SUPERVISION AND MANAGEMENT

# OFFICE SUPERVISION AND MANAGEMENT

## Description

This course is designed to provide an understanding of the major responsibilities and tasks in an entry-level secretarial or administrative position. The objectives of the course are to develop proficiencies, solve business-oriented problems, complete general office and receptionist tasks and demonstrate effective human relation skills. Students will evaluate career opportunities within the modern business office.

## Purpose

The purpose of this course is to provide the skills and knowledge necessary for employment in business occupations in various work areas.

## COURSE OUTLINE – OFFICE SUPERVISION AND MANAGEMENT

I. Develop Personal Traits

- A. Assessing personality, grooming, and work habits
- B. Developing positive work habits, necessary personal qualities, and appropriate grooming habits needed for job success

II. Meet the Public Face to Face

- A. Greeting callers
- B. Scheduling appointments
- C. Refusing callers
- D. Handling emergencies

III. Develop Telephone Techniques

- A. Developing skills in the use of the directory
- B. Developing skills in receiving and placing calls
- C. Developing skills in using telephone intercom system
- D. Developing skills in recording messages

IV. Develop Skills in the Use of Reference Books

- A. Dictionary
- B. Thesaurus
- C. Telephone directories
- D. City directories
- E. *Readers' Guide to Periodical Literature*
- F. *World Almanac*
- G. Reference manual for stenographers and typists
- H. *U. S. Official Postal Guide*
- I. *National Zip Code Directory*
- J. *Hotel and Motel Red Book*
- K. *Official Airline Guide*

V. Develop Keyboarding Skills

- A. Demonstrating basic typewriting skills
  - 1. Operate typewriter features
  - 2. Center
  - 3. Tabulate
  - 4. Underline
  - 5. Align on preprinted forms
  - 6. Address large and small envelopes
  - 7. Interpret proofreaders' symbols
- B. Demonstrating basic text-editing skills
  - 1. Operate text-editing features
  - 2. Key
  - 3. Edit
  - 4. Revise
  - 5. Store

6. Retrieve
7. Play out
8. Center
9. Underscore

VI. Develop Skills in Preparing Mailable Letters and Interoffice Memoranda

A. Reviewing letter placement and styles
B. Reviewing parts of a memorandum
C. Identifying sizes of office stationery

VII. Develop Skills in Letter Writing

A. Composing a business letter
B. Developing proper techniques of written communication using correct grammar, punctuation, spelling, and capitalization
C. Developing proofreading skills

VIII. Develop Word Processing Skills

A. Defining word processing vocabulary terms
B. Describing word processing equipment functions

IX. Develop Data Processing Skills

A. Defining data processing vocabulary terms
B. Describing data processing equipment functions

X. Develop Skills in the Use of Mail and Shipping Services

A. Handling incoming mail
B. Handling outgoing mail
C. Handling special mailings – bulk, express, certified, etc.
D. Handling air and surface shipping

XI. Develop Reprographic Skills

A. Preparing stencil and operating ink duplicator
B. Preparing master and operating fluid duplicator
C. Photocopying original document
D. Collating copies

XII. Develop Filing Skills

A. Applying rules for alphabetic, numeric, geographic, and subject filing
B. Identifing equipment and supplies for filing
C. Recognizing the uses of special files, micrographics, information systems, and records management

# COURSE OUTLINE – OFFICE SUPERVISION AND MANAGEMENT

XIII. Develop Skills in Planning Trips and Preparing Travel Forms

- A. Planning trip
- B. Preparing itinerary
- C. Preparing expense report

XIV. Develop Skills in Preparing Financial Statements and Business Reports

- A. Preparing bank records and bank reconciliation statements
- B. Preparing tax forms
- C. Preparing budget
- D. Preparing payroll records
- E. Preparing petty cash fund records
- F. Preparing business reports

XV. Develop Skills in the Use of Office Machines

- A. Operating electronic calculator
- B. Operating text-editing typewriter
- C. Operating data-entry device
- D. Operating dictation equipment

XVI. Secure Employment

- A. Locating employment opportunities
- B. Preparing resume
- C. Preparing application letter
- D. Completing application form
- E. Composing follow-up letter
- F. Preparing for interview
- G. Conducting simulated interview

XVII. Develop Skills in Management

- A. Defining management
- B. Identifying skills in effective management
- C. Identifying the levels of management
- D. Describing the responsibilities inherent in management
- E. Describing the various leadership styles of management

# COMPETENCIES – OFFICE SUPERVISION AND MANAGEMENT

The student is required to demonstrate the following competencies in order to complete successfully Office Supervision and Management.

| | | |
|---|---|---|
| IA | 1. | Complete self-appraisal on personality, grooming, and work habits. |
| IB | 2. | Demonstrate characteristics of positive work habits, necessary personal qualities, and appropriate grooming habits for job success. |
| IIA | 3. | Greet callers. |
| IIB | 4. | Schedule appointments. |
| IIC | 5. | Refuse callers. |
| IID | 6. | Handle emergencies. |
| IIIA | 7. | Use telephone directory. |
| IIIB | 8. | Use correct telephone procedures when receiving and placing calls. |
| IIIC | 9. | Use correct telephone procedures when using the intercom system. |
| IIID | 10. | Record messages. |
| IVA–K | 11. | Use reference books. |
| VA | 12. | Demonstrate basic typewriter features. |
| VB | 13. | Demonstrate basic text-editing features. |
| VIA | 14. | Type letter in each acceptable letter style. |
| VIB | 15. | Type memorandum. |
| VIC | 16. | Type letter on various sizes of stationery. |
| VIIA | 17. | Compose a business letter. |
| VIIB | 18. | Proofread a draft copy using correct grammar, punctuation, spelling, and capitalization. |
| VIIC | 19. | Proofread a draft copy using proofreaders' marks. |
| VIIIA | 20. | Define word processing vocabulary terms. |
| VIIIB | 21. | Describe word processing equipment functions. |
| IXA | 22. | Define data processing vocabulary terms. |
| IXB | 23. | Describe data processing equipment functions. |

## COMPETENCIES – OFFICE SUPERVISION AND MANAGEMENT

| | | |
|---|---|---|
| XA | 24. | Handle incoming mail. |
| XB | 25. | Handle outgoing mail. |
| XC | 26. | Handle special mailings. |
| XD | 27. | Handle air and surface shipping. |
| XIA | 28. | Prepare stencil and operate ink duplicator. |
| XIB | 29. | Prepare master and operate fluid duplicator. |
| XIC | 30. | Photocopy original document. |
| XID | 31. | Collate copies. |
| XIIA | 32. | File alphabetically, numerically, geographically, and by subject. |
| XIIB | 33. | Identify equipment and supplies for filing. |
| XIIC | 34. | Recognize the uses of special files, micrographics, information systems, and records management. |
| XIIIA | 35. | Plan trip. |
| XIIIB | 36. | Prepare itinerary. |
| XIIIC | 37. | Prepare expense report. |
| XIVA | 38. | Prepare bank records and bank reconciliation forms. |
| XIVB | 39. | Prepare tax forms. |
| XIVC | 40. | Prepare budget. |
| XIVD | 41. | Prepare payroll records. |
| XIVE | 42. | Prepare petty cash fund. |
| XIVF | 43. | Prepare business reports. |
| XVA | 44. | Operate electronic calculator. |
| XVB | 45. | Operate text-editing typewriter. |
| XVC | 46. | Operate data-entry device. |
| XVD | 47. | Operate dictation equipment. |
| XVIA | 48. | Locate employment opportunities. |

## COMPETENCIES – OFFICE SUPERVISION AND MANAGEMENT

XVIB 49. Prepare resume.

XVIC 50. Prepare application letter.

XVID 51. Complete application form.

XVIE 52. Compose follow-up letter.

XVIF 53. Prepare for interview.

XVIG 54. Conduct simulated interview.

XVIIA 55. Write a definition of management including the philosophy, goals, purpose, and principles.

XVIIB 56. Name two major conceptual skills needed in management.

XVIIB 57. Name three major human relations skills required in management.

XVIIB 58. Name the technical skills required in management.

XVIIC 59. Describe the responsibilities involved at the levels of management.

XVIID 60. List the overall responsibilities of management.

XVIIE 61. Name and describe the three major leadership styles of management.

## OBJECTIVES – OFFICE SUPERVISION AND MANAGEMENT

IA 1. Given a self-appraisal checklist, complete the form. The form must include items concerning personality, grooming, work habits, and machine operation.

IB 2. Given a list of positive work habits, necessary personal qualities, and appropriate grooming habits for job success, explain each with 100% accuracy.

IIA 3. Given an office situation, demonstrate appropriate response when greeting a caller.

IIB 4. Given a list of appointments and a calendar, schedule each appointment. Calendar must be completed correctly and contain no scheduling conflicts.

IIC 5. Given an office situation, demonstrate appropriate responses when refusing a caller.

IID 6. Given an office situation, demonstrate appropriate techniques when handling an emergency.

IIIA 7. Given a telephone directory, a list of ten names, and ten particular services, locate telephone numbers and select appropriate service numbers. Recorded information must be 100% accurate.

IIIB 8. Given five office situations and a teletrainer, demonstrate correct telephone procedures when receiving calls and placing calls. Techniques must be appropriate.

IIIC 9. Given five office situations and a telephone intercom, use the intercom correctly.

IIID 10. Given five office situations and a teletrainer, demonstrate correct procedures for recording messages.

IVA–K 11. Given 20 questions requiring the use of 11 different reference books, locate correct answers with 100% accuracy.

VA 12. Given an electric typewriter, demonstrate basic typewriter functions appropriately. The functions must include centering, tabulating, underlining, aligning on prepared forms, addressing large and small envelopes, and interpreting proofreaders' marks.

VB 13. Given a text-editing typewriter, demonstrate basic text-editing functions appropriately. The functions must include keying, editing, revising, storing, retrieving, playing out, centering, and underscoring.

VIA 14. Given an unarranged letter, type letter using an acceptable letter style with all errors neatly corrected.

VIB 15. Given an unarranged memorandum, type memo using an acceptable format with all errors neatly corrected.

# OBJECTIVES – OFFICE SUPERVISION AND MANAGEMENT

VIC 16. Given an unarranged letter and various sizes of stationery, type letter on different sizes of stationery in an acceptable format with all errors neatly corrected.

VIIA-C 17. Given a letter requiring a response, compose, proofread, and type the letter. The reply must be appropriate and the letter mailable.

VIIIA 18. Given a list of word processing vocabulary terms and a list of definitions, match the terms with the appropriate definition with 80% accuracy.

VIIIB 19. Given a chart of the operations in a word processing center, select and describe basic equipment needed. The selection should be justified and accurately described.

IXA 20. Given a list of data processing vocabulary terms and a list of definitions, match the terms with the appropriate definition with 80% accuracy.

IXB 21. Given a chart of operations in a data processing center, select and describe basic equipment needed. The selection should be justified and accurately described.

XA 22. Given ten pieces of incoming mail and a date stamp, correctly process the mail as follows: open, stamp, sort, and distribute.

XB 23. Given ten pieces of outgoing mail, process mail as follows: seal, weigh, and affix appropriate postage on each item.

XC 24. Given ten items for special handling, determine most appropriate mailing procedure and give an explanation.

XD 25. Given ten items for shipping, select best method of shipment and complete appropriate shipping forms with 100% accuracy.

XIA 26. Given unarranged copy, prepare a stencil. Duplicate 25 acceptable copies of the material for distribution to class. All errors must be corrected.

XIB 27. Given unarranged copy, prepare a fluid duplicator master with all errors corrected. Duplicate 25 acceptable copies for distribution to class.

XIC–D 28. Given an original, two-page document, photocopy and collate 25 copies for distribution to class. The copies must be acceptable, aligned, and readable documents.

XIIA 29. Given 50 documents to be filed, index, sort, and file alphabetically, numerically, geographically, and by subject with no more than five documents misfiled.

XIIB-C 30. Given a test of 50 questions on filing equipment and supplies, special files, micrographics, information systems, and records management, accurately answer questions.

## OBJECTIVES – OFFICE SUPERVISION AND MANAGEMENT

XIIIA 31. Given a case situation for a business trip, plan necessary travel arrangements. Plan must include sufficient travel time, reservations for transportation and lodging, and time for engagements and meeting the schedule.

XIIIB 32. Provided data for a trip, prepare and type an itinerary with all errors corrected.

XIIIC 33. Provided expenditures for a business trip, prepare and type an expense report with all errors corrected.

XIVA 34. Given the necessary information and forms, prepare checks and deposit slips, and complete check stubs with 100% accuracy.

XIVA 35. Given the necessary information and forms, prepare a bank reconciliation of a given bank statement. The statement must agree with the actual cash balance in the cash account.

XIVB 36. Given a federal tax deposit form, employer's quarterly federal tax return, state unemployment tax return, and tax records, prepare tax forms with 100% accuracy on numerical data and in compliance with the law.

XIVC 37. Given expense items from the previous year and a list of anticipated items for the coming year, prepare a budget. All calculations must be 100% accurate.

XIVD 38. Given completed time cards, payroll register, and an individual employee's record of earnings, complete and verify payroll records. The payroll records must be accurate and must balance.

XIVE 39. Given a petty cash fund, petty cash transactions, vouchers, and a petty cash journal, prepare vouchers and record transactions. All activities must be performed with 100% accuracy.

XIVF 40. Given financial data, prepare and type a business report with all errors neatly corrected.

XVA 41. Given a 40-problem test on the electronic calculator, operate the machine correctly by solving problems involving memory, reciprocals, decimals, discounts, payroll, and percent of markup. Accurately complete the test in 45 minutes.

XVB 42. Given a rough draft letter, operate a text-editing typewriter. The document must be mailable.

XVC 43. Given access to a data-entry device (keypunch, card reader, tape drive, disk drive, or terminal), operate data-entry device appropriately so that output (printer, cards, tape, or disk) is accurate when verified.

XVD 44. Given a transcriber and dictated material, accurately transcribe three mailable documents in 45 minutes.

## OBJECTIVES – OFFICE SUPERVISION AND MANAGEMENT

XVIA 45. Given job placement information such as newspaper ads and personal contacts, list a minimum of ten jobs in your community. One week will be allowed to complete the list.

XVIB 46. Given examples of suitable resumes/personal data sheets, prepare and type a personal resume on quality paper with all errors acceptably corrected.

XVIC 47. Given a newspaper ad for a business position, compose a letter of application. The letter must be mailable and include necessary personal information.

XVID 48. Given an application blank, complete the form. The application form should be neatly typed and aligned, and all information must be accurate.

XVIE 49. Given a case situation, compose and type a follow-up letter. The letter must be mailable and appropriate for the situation.

XVIF-G50. Given a job interview checklist, participate in a mock job interview. All items on checklist should receive an acceptable rating.

XVIIA 51. The student will be able to write accurately a definition of management which includes the following components: philosophy, goals, purpose, and principles.

XVIIB 52. The student will be able to describe accurately in writing the conceptual skills required in determining how all parts of a business organization fit together.

XVIIB 53. The student will be able to describe accurately in writing the conceptual skills needed to discover new methods for performing old tasks.

XVIIB 54. The student will be able to describe accurately in writing the "Need" hierarchy and its relationship to human relation skills needed in management.

XVIIB 55. The student will be able to list correctly five motivation skills needed in management.

XVIIB 56. The student will be able to list and discuss correctly two technical skills.

XVIIC 57. The student will name the three management levels.

XVIIC 58. The student will be able to name two major responsibilities for executive, middle and entry-level management.

XVIID 59. The student will be able to name the two major responsibilities of management.

XVIID 60. The student will be able to describe accurately in writing the purpose of planning and the types of management plans.

XVIID 61. Given management positions, the student will draw accurately a management hierarchy flowchart.

## OBJECTIVES – OFFICE SUPERVISION AND MANAGEMENT

XVIIE 62. The student will be able to list two advantages and two disadvantages of the autocratic management style.

XVIIE 63. The student will be able to list two advantages and two disadvantages of the democratic management style.

XVIIE 64. The student will be able to list two advantages and two disadvantages of the leaderless management style.

## OFFICE SUPERVISION AND MANAGEMENT CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Completes self-appraisal on personality, grooming, and work habits. | | | |
| IB | Demonstrates characteristics of positive work habits, necessary personal qualities, and appropriate grooming habits for job success. | | | |
| IIA | Greets callers. | | | |
| IIB | Schedules appointments. | | | |
| IIC | Refuses callers. | | | |
| IID | Handles emergencies. | | | |
| IIIA | Uses telephone directory. | | | |
| IIIB | Uses correct telephone procedures when receiving and placing calls. | | | |
| IIIC | Uses correct telephone procedures when using the intercom system. | | | |
| IIID | Records messages. | | | |
| IVA-K | Uses reference books. | | | |

## OFFICE SUPERVISION AND MANAGEMENT CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VA | Demonstrates basic typewriter features. | | | |
| VB | Demonstrates basic text-editing features. | | | |
| VIA | Types letter in each acceptable letter style. | | | |
| VIB | Types memorandum. | | | |
| VIC | Types letter on various sizes of stationery. | | | |
| VIIA | Composes a business letter. | | | |
| VIIB | Proofreads a draft copy using correct grammar, punctuation, spelling, and capitalization. | | | |
| VIIC | Proofreads a draft copy using proofreaders' marks. | | | |
| VIIIA | Defines word processing vocabulary terms. | | | |
| VIIIB | Describes word processing equipment functions. | | | |
| IXA | Defines data processing vocabulary terms. | | | |

# OFFICE SUPERVISION AND MANAGEMENT CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IXB | Describes data processing equipment functions. | | | |
| XA | Handles incoming mail. | | | |
| XB | Handles outgoing mail. | | | |
| XC | Handles special mailings. | | | |
| XD | Handles air and surface shipping. | | | |
| XIA | Prepares stencil and operates ink duplicator. | | | |
| XIB | Prepares master and operates fluid duplicator. | | | |
| XIC | Photocopies original document. | | | |
| XID | Collates copies. | | | |
| XIIA | Files alphabetically, numerically, geographically, and by subject. | | | |
| XIIB | Identifies equipment and supplies for filing. | | | |

## OFFICE SUPERVISION AND MANAGEMENT CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| XIIC | Recognizes the uses of special files, micrographics, information systems, and records management. | | | |
| XIIIA | Plans trip. | | | |
| XIIIB | Prepares itinerary. | | | |
| XIIIC | Prepares expense report. | | | |
| XIVA | Prepares bank records and bank reconciliation forms. | | | |
| XIVB | Prepares tax forms. | | | |
| XIVC | Prepares budget. | | | |
| XIVD | Prepares payroll records. | | | |
| XIVE | Prepares petty cash fund. | | | |
| XIVF | Prepares business reports. | | | |
| XVA | Operates electronic calculator. | | | |

## OFFICE SUPERVISION AND MANAGEMENT CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| XVB | Operates text-editing typewriter. | | | |
| XVC | Operates data-entry device. | | | |
| XVD | Operates dictation equipment. | | | |
| XVIA | Locates employment opportunities. | | | |
| XVIB | Prepares resume. | | | |
| XVIC | Prepares application letter. | | | |
| XVID | Completes application form. | | | |
| XVIE | Composes follow-up letter. | | | |
| XVIF | Preprares for interview. | | | |
| XVIG | Conducts simulated interview. | | | |
| XVIIA | Writes definition of management. | | | |

## OFFICE SUPERVISION AND MANAGEMENT CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| XVIIB | Names major skills of management. | | | |
| XVIIC | Describes responsibilities involved at three major levels of management. | | | |
| XVIID | Lists overall responsibilities of management. | | | |
| XVIIE | Describes three major leadership styles of management. | | | |
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| | | | | |

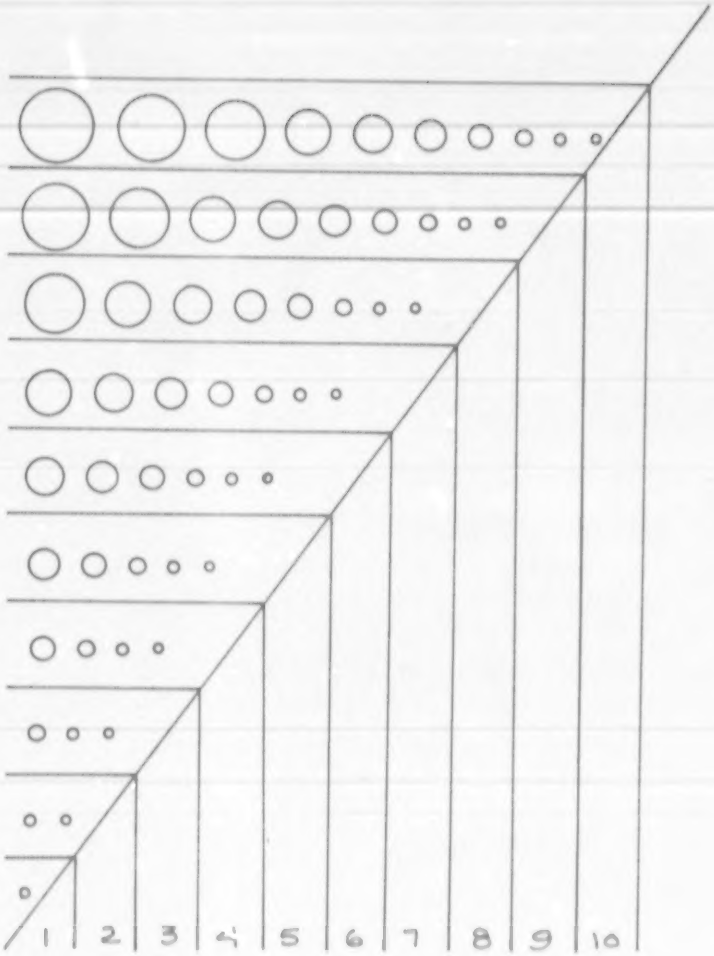
| PROFICIENCY RATING | |
|---|---|
| **Scale Value** | **Definition** |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

| | |
|---|---|
| Phase I | Grade ______ |
| Phase II | Grade ______ |
| | Final Grade ______ |



# RECORD KEEPING I

## RECORD KEEPING I

### Description

This course is designed to introduce the student to the basic elements of keeping records: banking, purchasing, selling, controlling inventory, performing cashier duties, computing payroll, budgeting, verifying data, and filing.

### Purpose

The purpose of this course is to provide the student with an understanding of the principles and procedures involved in planning, managing, and recording business transactions. Record keeping provides entry-level training for routine clerical activities, personal use, or prevocational activities.

## COURSE OUTLINE – RECORD KEEPING I

I. Introduction to Record Keeping

- A. Inspecting, verifying, and correcting names, numbers, and addresses
- B. Writing legibly
- C. Filing business papers
  - 1. Alphabetically
  - 2. Numerically
  - 3. Chronologically
  - 4. By subject
  - 5. Geographically
- D. Operating calculating machines

II. Record Keeping for Cashiers

- A. Recording receipts
- B. Proving cash in the cash register
- C. Preparing the cash-proof form

III. Record Keeping for Banking

- A. Preparing checks
- B. Maintaining checkbook record stubs
- C. Endorsing checks and making deposits
- D. Reconciling bank statement

IV. Record Keeping for Petty Cash

- A. Preparing petty cash vouchers
- B. Recording petty cash vouchers
- C. Replenishing petty cash fund

V. Record Keeping for Personal Life

- A. Preparing a budget
- B. Keeping personal record of income and expenses
- C. Recording receipts and payments

VI. Record Keeping for Sales

- A. Preparing sales slips
- B. Computing sales taxes
- C. Keeping records for charge customers
- D. Processing sales returns
- E. Preparing statements of account
- F. Recording entries in a sales journal

VII. Record Keeping for Purchasing

- A. Maintaining stock cards and preparing purchase requisitions
- B. Preparing price quotation cards
- C. Maintaining a record of goods expected
- D. Preparing purchase orders
- E. Recording entries in a purchases journal
- F. Processing purchase invoices

VIII. Record Keeping for a Payroll Department

- A. Computing wages using time cards
  - 1. Regular earnings
  - 2. Overtime earnings
- B. Preparing payroll register and payroll checks
  - 1. Compute federal deductions
  - 2. Compute state deductions
  - 3. Compute other deductions
- C. Maintaining employees' records of earnings
- D. Computing employer's share of payroll tax expense
  - 1. FICA
  - 2. Unemployment
- E. Preparing W-2 forms

IX. Record Keeping for Cash Receipts and Cash Payments

- A. Preparing income statement
- B. Recording entries in cash receipts journal
- C. Recording entries in cash payments journal
- D. Posting to the general ledger

## COMPETENCIES – RECORD KEEPING I

The student is required to demonstrate the following competencies in order to complete successfully Record Keeping I.

IA 1. Inspect, verify, and correct data.

IB 2. Write legibly.

IC 3. File materials alphabetically and chronologically.

IC 4. File materials numerically.

IC 5. File materials geographically.

IC 6. File materials by category.

ID 7. Operate calculating machines.

IIA 8. Record receipts for checks and cash sales.

IIB–C 9. Prove cash and prepare a cash-proof form.

IIIA–B 10. Prepare checks and maintain checkbook record stubs.

IIIC 11. Endorse checks and make bank deposits.

IIID 12. Reconcile bank statement.

IVA–B 13. Prepare petty cash vouchers and record.

IVC 14. Replenish petty cash fund.

VA 15. Prepare a budget.

VB 16. Keep personal record of income and expenses.

VC 17. Record receipts and payments on a receipts and payments form.

VIA 18. Prepare sales slips.

VIB 19. Compute sales taxes.

VIC 20. Keep records for charge customers.

VID 21. Process sales returns.

VIE 22. Prepare statements of account.

VIF 23. Record entries in a sales journal.

VIIA 24. Maintain stock cards and prepare purchase requisitions.

VIIB 25. Prepare price quotation cards.

## COMPETENCIES – RECORD KEEPING I

VIIC 26. Maintain a record of goods expected.

VIID 27. Prepare purchase orders.

VIIE 28. Record entries in a purchases journal.

VIIF 29. Process purchase invoices.

VIIIA 30. Compute wages.

VIIIB 31. Prepare payroll register and payroll checks.

VIIIC 32. Maintain employees' records of earnings.

VIIID 33. Prepare W-2 forms.

IXA 34. Prepare income statement.

IXB 35. Record entries in a cash receipts journal.

IXC 36. Record entries in a cash payments journal.

IXD 37. Post to the general ledger.

## OBJECTIVES – RECORD KEEPING I

IA 1. Given source documents and a group of business papers and records (some of which contain errors), inspect and verify the accuracy of the written and numerical data. Make necessary corrections. All the errors must be detected and corrected.

IB 2. Given blank business forms, complete forms legibly. The instructor must be able to read information easily.

IC 3. Given 25 documents to be filed alphabetically, file the documents alphabetically and chronologically. No more than three documents may be misfiled.

IC 4. Given 25 documents to be filed numerically, file the documents using the numerical method. No more than three documents may be misfiled.

IC 5. Given 25 documents to be filed geographically, file the documents using the geographical method. No more than three documents may be misfiled.

IC 6. Given 25 items to be filed by subject, file the items using the subject method. No more than three documents may be misfiled.

ID 7. Given 25 problems to calculate in a limited amount of time, operate the calculator using correct fingering and operational procedures. No more than three errors may occur for a satisfactory grade.

IIA 8. Given blank receipt forms and information on sales transactions involving payments by checks and cash, prepare a receipt for each sale. Each receipt must include customer's name, amount of payment, date, and identification of item sold.

IIB–C 9. Given a cash register tape and a cash register drawer, prove cash and prepare the cash-proof form accurately.

IIIA–B 10. Given check stubs, blank check forms, and five bills to be paid, complete the stubs and write the checks. All items must be accurate and legibly written on checks and stubs.

IIIC 11. Given three checks, cash, information on the manner in which the checks will be cashed or deposited, and a deposit slip, endorse each check using the blank, restrictive, and/or full method of endorsement. Each endorsement must be appropriate for the situation. The deposit must agree with the total recorded on the deposit slip.

IIID 12. Given a blank statement, cancelled checks, previous monthly bank reconciliation form, check stubs, cash ledger sheet, and records of deposits, reconcile the bank statement. The balance in the cash account and the reconciled statement must be in agreement and represent the actual cash balance.

IVA 13. Given a petty cash box and five blank vouchers, prepare a voucher for each of five transactions. All items must be completed accurately and legibly.

## OBJECTIVES – RECORD KEEPING I

IVB 14. Given five petty cash vouchers, sort them according to accounts and make an entry to record the transactions accurately.

IVC 15. Given a petty cash box containing cash, petty cash vouchers, checkbook, and appropriate journals and ledgers, replenish the petty cash fund with no errors.

VA 16. Provided an estimate of receipts and payments, prepare a budget for an individual so that personal expenditures do not exceed personal income.

VB 17. Given a record of receipts and payments, keep a personal record of actual expenditures and income for one month. The actual cash on hand at the end of the month must agree with the balance of the recorded receipts and payments.

VC 18. Given a list of actual receipts and payments, record them in a record of receipts and payments. The amounts must be recorded in the appropriate columns, and columnar totals must balance.

VIA 19. Given necessary forms and data, prepare four sales slips in duplicate with no procedural or mathematical errors.

VIB 20. Given four partially completed sales slips, compute the subtotal, the sales taxes, and the grand total of each sales slip. All entries must be legible and all computations must be accurate.

VIC 21. Given ten completed sales slips, open a ledger account for each customer and accurately record charge sales, record collections, and the account balance.

VID 22. Given data necessary for preparing a credit memo, process the sales return and allowance memorandum. The memo must be without error. Use a sales returns and allowances journal to record the entry accurately.

VIE 23. Given the accounts for 25 charge customers, prepare an accurate monthly statement for each customer.

VIF 24. Given duplicates of completed sales invoices, a sales journal, and a general ledger, record accounting entries pertaining to sale of merchandise using a sales journal without errors.

VIIA 25. Given the necessary data and forms, maintain stock record cards for each of the items. Keep the balance on hand at the maximum using purchase requisitions for one month with no procedural or computational errors.

VIIB 26. Given the necessary data and forms, prepare five price quotation cards with no computational or procedural errors.

VIIC 27. Given valid purchase requisitions and a record of stock received for one month, maintain an accurate record of goods expected.

VIID 28. Given three blank purchase orders and items to be ordered, prepare the purchase orders in complete form. Each of the three must be completed accurately.

# OBJECTIVES – RECORD KEEPING I

VIIE 29. Given ten purchase invoices, verify and record them in a purchases journal. The purchases journal must be completed accurately.

VIIF 30. Given ten purchase invoices with varying cash discount terms (e.g., 2/10, n/30, 2/10 end-of-month), compute the allowable cash discounts and the net amount of the invoice. The calculations must be accurate.

VIIIA 31. Given a group of punched time cards, rate of pay, and company policy for computing hours and overtime rates, compute wages. All calculations must be accurate.

VIIIB 32. Given personal data, records of earnings, record forms, withholding tables, and completed time cards, determine payroll deductions, prepare a payroll register, and write checks. All calculations must be accurate and the register must balance. Checks must be for the correct amount.

VIIIC 33. Given the completed payroll register and employees' records of earnings, accurately complete the necessary information on the employees' records for the pay period.

VIIID 34. Provided a payroll register for a given period and rates of employer's payroll taxes, compute the employer's FICA, Federal Unemployment Taxes form, and State Unemployment Taxes form. No errors are acceptable.

IXA 35. Given the necessary data, accurately prepare an income statement for a small business.

IXB 36. Given the duplicate invoices for one week for a small retail service business, record the necessary information in a cash receipts journal accurately.

IXC 37. Given the checkbook containing stubs of payments made, accurately record the information in a cash payments journal.

IXD 38. Given a cash payments journal and a cash receipts journal with transactions completed, post to the general ledger and prove cash. The ledger must balance after posting.

## RECORD KEEPING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Inspects, verifies, and corrects data. | | | |
| IB | Writes legibly. | | | |
| IC | Files materials alphabetically and chronologically. | | | |
| IC | Files materials numerically | | | |
| IC | Files materials geographically. | | | |
| IC | Files materials by subject. | | | |
| ID | Operates calculating machines. | | | |
| IIA | Records receipts for checks and cash sales. | | | |
| IIB-C | Proves cash and prepares a cash-proof form. | | | |
| IIIA-B | Prepares checks and maintains checkbook record stubs. | | | |
| IIIC | Endorses checks and makes bank deposits. | | | |

# RECORD KEEPING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IIID | Reconciles bank statement. | | | |
| IVA-B | Prepares petty cash vouchers and records. | | | |
| IVC | Replenishes petty cash fund. | | | |
| VA | Prepares a budget. | | | |
| VB | Keeps personal record of income and expenses. | | | |
| VC | Records receipts and payments on a receipts and payments form. | | | |
| VIA | Prepares sales slips. | | | |
| VIB | Computes sales taxes. | | | |
| VIC | Keeps records for charge customers. | | | |
| VID | Processes sales returns. | | | |
| VIE | Prepares statements of account. | | | |

## RECORD KEEPING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIF | Records entries in a sales journal. | | | |
| VIIA | Maintains stock cards and prepares purchase requisitions. | | | |
| VIIB | Prepares price quotation cards. | | | |
| VIIC | Maintains a record of goods expected. | | | |
| VIID | Prepares purchase orders. | | | |
| VIIE | Records entries in a purchases journal. | | | |
| VIIF | Processes purchase invoices. | | | |
| VIIIA | Computes wages. | | | |
| VIIIB | Prepares payroll register and payroll checks. | | | |
| VIIIC | Maintains employees' records of earnings. | | | |
| VIIID | Prepares W-2 forms. | | | |

## RECORD KEEPING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IXA | Prepares income statement. | | | |
| IXB | Records entries in a cash receipts journal. | | | |
| IXC | Records entries in a cash payments journal. | | | |
| IXD | Posts to the general ledger. | | | |
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| | | | | |

| PROFICIENCY RATING | |
|---|---|
| **Scale Value** | **Definition** |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

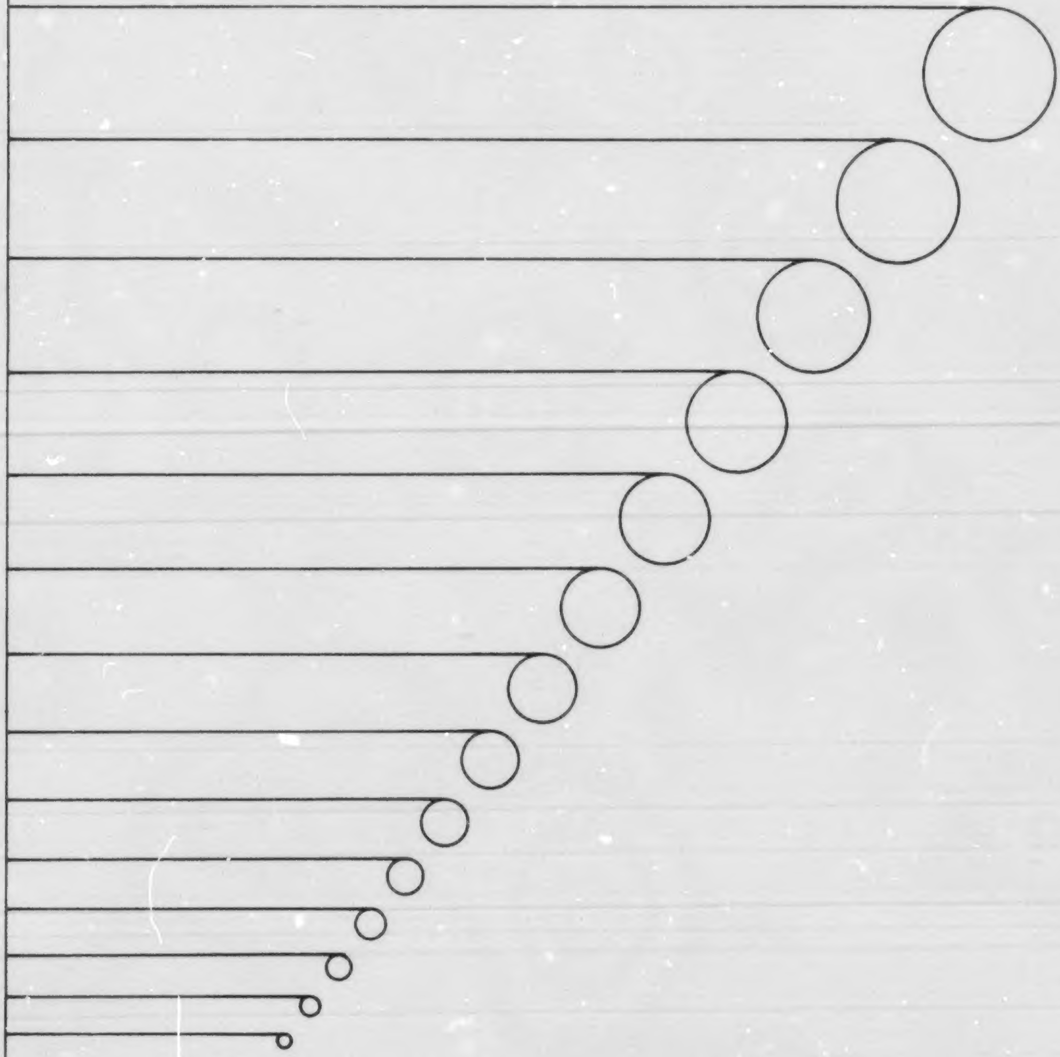
In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________



# RECORD KEEPING II

# RECORD KEEPING II

## Description

This course is a continuation of Record Keeping I. The study of record keeping for sales, purchases, payroll, and cash transactions is expanded through the use of projects designed to give the student practice in processing business papers for various types of businesses. It also introduces the student to accounting.

## Purpose

The purpose of this course is to reinforce the student's entry-level training for clerical jobs. It also provides the student with a broad base of office skills and prepares the student for employment in a cluster of high-frequency record keeping jobs. A simulation is recommended for use during the second semester. A rotation plan involving eight different occupations is also suggested.

# COURSE OUTLINE – RECORD KEEPING II

I. Keeping Records for a Restaurant

- A. Completing time sheets
- B. Preparing payroll register
- C. Processing waitress checks
  - 1. Prepare daily cash report form
  - 2. Prepare monthly sales records
- D. Journalizing transactions in a cash payments journal
- E. Preparing comparative payments summary

II. Keeping Records for an Insurance Company

- A. Completing insurance policy invoices
- B. Recording cash receipts on customer cards
- C. Preparing schedule of accounts receivable
- D. Preparing accounts current summary
- E. Keeping petty cash records

III. Keeping Records for a Retail Store That Sells Through Agents

- A. Preparing sales slips and computing sales taxes
- B. Preparing company order forms and computing commissions
- C. Preparing alphabetical lists of new customers

IV. Keeping Records for a Retail Store That Sells Through Cash Sales, Charge Accounts, and Layaways

- A. Recording coded cost price on merchandise
- B. Computing markup and selling price
- C. Verifying accuracy of sales taxes
- D. Recording sales in a sales journal
- E. Preparing account cards from duplicate sales slips
- F. Recording cash received on account cards
- G. Preparing schedule of accounts receivable

V. Keeping Payroll Records for a Department Store With Waged and Salaried Employees

- A. Completing time sheets
- B. Preparing payroll register
- C. Preparing payroll cash sheet
- D. Preparing bank payroll slip
- E. Maintaining employees' records of earnings

VI. Keeping Records for a Supermarket

- A. Verifying purchase orders
- B. Preparing daily cashier report
- C. Preparing weekly cashier shortage and overage report
- D. Preparing deposit slips
- E. Preparing daily cash report

F. Pricing goods received
G. Recording purchase orders on purchase register sheets
H. Writing checks in payment of invoices
I. Journalizing transactions in cash receipts journal
J. Journalizing transactions in cash payments journal
K. Completing end-of-quarter work
  1. Prepare a balance sheet
  2. Prepare income statement
  3. Prepare a comparative statement of operations

## COMPETENCIES – RECORD KEEPING II

The student is required to demonstrate the following competencies in order to complete successfully Record Keeping II.

| | | |
|---|---|---|
| IA | 1. | Complete time sheets. |
| IB | 2. | Prepare payroll register. |
| IC | 3. | Process waitress checks. |
| IC | 4. | Prepare daily cash report form. |
| IC | 5. | Prepare monthly sales records. |
| ID | 6. | Journalize transactions in a cash payments journal. |
| IE | 7. | Prepare comparative payments summary. |
| IIA | 8. | Complete insurance policy invoices. |
| IIB | 9. | Record cash receipts on customer cards. |
| IIC | 10. | Prepare schedule of accounts receivable. |
| IID | 11. | Prepare accounts current summary. |
| IIE | 12. | Keep petty cash records. |
| IIIA | 13. | Prepare sales slips and compute sales taxes. |
| IIIB | 14. | Prepare company order form and compute commissions. |
| IIIC | 15. | Prepare alphabetical list of new customers. |
| IVA | 16. | Record coded cost price on merchandise. |
| IVB | 17. | Compute markup and selling price. |
| IVC | 18. | Verify accuracy of sales taxes. |
| IVD | 19. | Record sales in a sales journal. |
| IVE | 20. | Prepare account cards from duplicate sales slips. |
| IVF | 21. | Record cash received on account cards. |
| IVG | 22. | Prepare schedule of accounts receivable. |
| VA | 23. | Complete time sheets. |
| VB | 24. | Prepare payroll register. |
| VC | 25. | Prepare payroll cash sheet. |

## COMPETENCIES – RECORD KEEPING II

| | | |
|---|---|---|
| VD | 26. | Prepare bank payroll slip. |
| VE | 27. | Maintain employees' records of earnings. |
| VIA | 28. | Verify purchase orders. |
| VIB | 29. | Prepare daily cashier. |
| VIC | 30. | Prepare weekly cashier shortage and overage report. |
| VID | 31. | Prepare deposit slips. |
| VIE | 32. | Prepare daily cash report. |
| VIF | 33. | Price goods received. |
| VIG | 34. | Record purchase orders on purchase register sheets. |
| VIH | 35. | Write checks in payment of invoices. |
| VII | 36. | Journalize transactions in a cash receipts journal. |
| VIJ | 37. | Journalize transactions in a cash payments journal. |
| VIK | 38. | Prepare a balance sheet. |
| VIK | 39. | Prepare an income statement. |
| VIK | 40. | Prepare a comparative statement of operations. |

## OBJECTIVES – RECORD KEEPING II

IA 1. Given punched time sheets for restaurant employees for two one-week periods, complete the total hours worked accurately.

IB 2. Given completed time sheets for 24 employees for two weeks, prepare a payroll register for each of the two-week pay periods. Each register must balance across the total line.

IC 3. Given the necessary cash register tapes and checks prepared by restaurant personnel, prepare daily cash reports for five weeks accurately.

IC 4. Given five weeks of daily cash reports and sales tax forms for each week, prepare a monthly sales report accurately.

ID 5. Given the cash payments for three months and the deposits, prepare the cash payments journal for three months without errors.

IE 6. Given the cash payments journal, prepare a comparative payments summary for three months. All amounts must be correct and balance.

IIA 7. Given payments and dates received from policyholders, record the information on the accounts receivable copy of the invoice accurately.

IIB 8. Given 40 accounts receivable copies of insurance policies for customers, record the amount of premium on the bottom of each card, the date, and the policy number accurately.

IIC 9. Given an accounts receivable binder with copies of insurance policy invoices, accurately prepare a schedule of accounts receivable.

IID 10. Given a summary of the information for one month for insurance policies issued through four different companies, prepare four accounts current summaries without error.

IIE 11. Given the payments to petty cash for one month, complete a cash disbursements journal without errors in computation.

IIIA 12. Given the sales for six days for an agent, a company catalog, and a sales tax table, prepare the sales slips for the week and compute sales taxes without errors.

IIIB 13. Given the sales for one week, accurately prepare the company order form including the amount of commissions earned.

IIIC 14. Given the duplicate sales slips for new customers, prepare an alphabetical list of names. All names must be accurately included in alphabetical order.

IVA 15. Given the code words for a retail store and the selling price of 30 articles, determine the coded cost price of each item accurately.

IVB 16. Given 30 articles, the cost of each item and the markup percentage, accurately compute the amount of markup, the cost plus markup, and the selling price.

## OBJECTIVES – RECORD KEEPING II

IVC 17. Given a list of 30 articles sold, selling price, amount of sales taxes, and total to be paid by customer, correctly verify the accuracy of the amount of sales tax.

IVD 18. Given the necessary dates, complete 12 sales slips. Completely and accurately record the charge, layaway, and cash sales in a sales journal.

IVE 19. Given six blank account cards, accurately and completely prepare one for each of six duplicate sales slips.

IVE 20. Given charge and layaway sales slips for a month, correctly prepare the necessary account cards.

IVF 21. Given the payments received from customers for two months, accurately record the receipts on the account cards.

IVG 22. Given the account cards for customers, prepare a schedule of accounts receivable at the end of two months. The schedule must be accurate and balance with the customer's account card total.

VA 23. Given a punched time sheet for each of 22 employees for four weeks, accurately complete the total hours for each employee for each week.

VB 24. Given the necessary tables and completed time sheets for four weeks, accurately prepare the payroll register for 22 employees for each week.

VC 25. Given the completed payroll registers for four weeks, accurately prepare four payroll cash sheets.

VD 26. Given four prepared payroll cash sheets for four weeks, accurately prepare four bank payroll sheets.

VE 27. Given the necessary data, including W-2's for each employee, accurately prepare employees' records of earnings for the month.

VIA 28. Given a daily receiving log for two days (containing errors), verify 12 invoices making necessary corrections. All errors must be corrected.

VIB 29. Given the necessary information, accurately prepare eight daily cashier report forms.

VIC 30. Given the necessary information, prepare a weekly cashier shortage and overage report. All discrepancies must be recorded accurately.

VID–E 31. Given the daily cash report forms for a particular day and the sales for each department from eight registers, prepare the daily cash reports and make the deposit. The total deposit must agree with the total recorded on the deposit slip.

VIF 32. Given a list of 50 items of merchandise, the percentage of markup, and the cost of each item, determine the selling price accurately.

## OBJECTIVES – RECORD KEEPING II

VIG 33. Given the necessary data, correctly prepare purchase register sheets.

VIH 34. Given invoices for one month, process them for payment and write checks. The total invoice amount must agree with the check amount.

VII 35. Given the cash receipts for the month, accurately record them in a cash receipts journal.

VIJ 36. Given 27 check stubs for written checks, accurately journalize the entries in a cash payments journal.

VIK 37. Given the necessary information for a fiscal period covering three months, prepare a balance sheet. All income items must balance with liabilities and capital amounts.

VIK 38. Given the necessary information for a fiscal period covering three months, prepare an income statement. The statement must accurately reflect the amount of income, expenses, and net income.

VIK 39. Given the necessary information, complete a comparative statement of operations. The information must be accurate and complete.

## RECORD KEEPING II CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Completes time sheets. | | | |
| IB | Prepares payroll register. | | | |
| IC | Processes waitress checks. | | | |
| IC | Prepares daily cash report form. | | | |
| IC | Prepares monthly sales records. | | | |
| ID | Journalizes transactions in a cash payments journal. | | | |
| IE | Prepares comparative payments summary. | | | |
| IIA | Completes insurance policy invoices. | | | |
| IIB | Records cash receipts on customer cards. | | | |
| IIC | Prepares schedule of accounts receivable. | | | |
| IID | Prepares accounts current summary. | | | |

## RECORD KEEPING II CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IIE | Keeps petty cash records. | | | |
| IIIA | Prepares sales slips and computes sales taxes. | | | |
| IIIB | Prepares company order form and computes commissions. | | | |
| IIIC | Prepares alphabetical list of new customers. | | | |
| IVA | Records coded cost price on merchandise. | | | |
| IVB | Computes markup and selling price. | | | |
| IVC | Verifies accuracy of sales taxes. | | | |
| IVD | Records sales in a sales journal. | | | |
| IVE | Prepares account cards from duplicate sales slips. | | | |
| IVF | Records cash received on account cards. | | | |
| IVG | Prepares schedule of accounts receivable. | | | |

## RECORD KEEPING II CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VA | Completes time sheets. | | | |
| VB | Prepares payroll register. | | | |
| VC | Prepares payroll cash sheet. | | | |
| VD | Prepares bank payroll slip. | | | |
| VE | Maintains employees' records of earnings. | | | |
| VIA | Verifies purchase orders. | | | |
| VIB | Prepares daily cashier report. | | | |
| VIC | Prepares weekly cashier shortage and overage report. | | | |
| VID | Prepares deposit slips. | | | |
| VIE | Prepares daily cash report. | | | |
| VIF | Prices goods received. | | | |

## RECORD KEEPING II CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIG | Records purchase orders on purchase register sheets. | | | |
| VIH | Writes checks in payment of invoices. | | | |
| VII | Journalizes transactions in a cash receipts journal. | | | |
| VIJ | Journalizes transactions in a cash payments journal. | | | |
| VIK | Prepares a balance sheet. | | | |
| VIK | Prepares an income statement. | | | |
| VIK | Prepares a comparative statement of operations. | | | |
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| | | | | |
| | | | | |

| PROFICIENCY RATING | |
|---|---|
| Scale Value | Definition |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________

# SHORTHAND I

## Description

This course is designed to present shorthand principles and theory, practice in reading and writing shorthand outlines, and the introduction of basic transcription skills. Daily homework is required.

## Purpose

The purpose of this course is to provide a foundation for the study of advanced dictation and transcription. It serves the needs of students who have immediate vocational goals of entry-level stenographic positions and also students who have prevocational objectives and plan to continue their education beyond high school.

## COURSE OUTLINE – SHORTHAND I (FIRST PHASE)

I. Shorthand Principles and Theory

- A. Spelling the characters of the alphabet phonetically, reading shorthand outlines, and reading English words
- B. Reading and memorizing special abbreviations and brief/speed forms for common words and their derivatives
- C. Joining two or more shorthand outlines together to form a phrase; writing shorthand phrases

II. Reading and Writing Practice

- A. Reading familiar textbook word lists and connected reading material
- B. Constructing the shorthand outlines in the textbook
- C. Reading shorthand plate material; writing material from dictation several times at gradually increasing speeds; practicing control of outline formation; reading back shorthand notes
- D. Practicing penmanship for proper outline proportions applying correct shorthand theory

III. Introduction to Transcription

- A. Identifying, spelling, and defining business vocabulary words and expressions
- B. Identifying, spelling, and defining difficult spelling words, words belonging to family groups, and words that sound alike
- C. Applying frequently used comma rules and listing reasons for use
- D. Defining common prefixes
- E. Identifying frequently made errors in grammar
- F. Transcribing words, phrases, and sentences from board or projector
- G. Transcribing a letter from textbook
- H. Transcribing a letter from notes written for homework
- I. Transcribing notes from familiar material dictation
- J. Using dictionary and other references
- K. Proofreading transcriptions

## COMPETENCIES – SHORTHAND I (FIRST PHASE)

The student is required to demonstrate the following compentencies in order to complete successfully Shorthand I (First Phase).

| | | |
|---|---|---|
| IA | 1. | Spell phonetically and read outlines and words. |
| IB | 2. | Construct shorthand outlines for abbreviations and for common words. |
| IC | 3. | Write outlines which comprise phrases. |
| IIA | 4. | Read familiar shorthand material. |
| IIB | 5. | Write outlines for words, sentences, and paragraphs. |
| IIC | 6. | Write shorthand from dictation and read back notes. |
| IID | 7. | Write outlines of words using proper proportions and theory. |
| IIIA | 8. | Identify, spell, and define business vocabulary. |
| IIIB | 9. | Identify, spell, and define incorrectly spelled words and distinguish between words that sound alike. |
| IIIC | 10. | Apply punctuation (comma) rules. |
| IIID | 11. | Define words containing prefixes. |
| IIIE | 12. | Identify and correct grammatical errors. |
| IIIF | 13. | Transcribe words, phrases, and sentences from board or projector. |
| IIIG | 14. | Transcribe from shorthand plate. |
| IIIH | 15. | Transcribe from homework notes. |
| IIII | 16. | Transcribe from dictation of familiar material. |
| IIIJ | 17. | Use dictionary and other references. |
| IIIK | 18. | Proofread transcriptions. |

## OBJECTIVES – SHORTHAND I (FIRST PHASE)

| | | |
|---|---|---|
| IA | 1. | Given a list of 20 shorthand outlines and a list of 20 longhand words, spell phonetically and read from each list accurately. |
| IB | 2. | Given a dictated list of 20 common words, accurately construct the outlines for the abbreviations and brief/speed forms. |
| IC | 3. | Given a dictated list of common phrases, accurately write together the two or more shorthand outlines which comprise each phrase legibly and according to principle. |
| IIA | 4. | Given familiar textbook plate material, read shorthand rapidly and accurately. |
| IIB | 5. | Given familiar words, sentences, and paragraphs from textbook plates, construct written shorthand outlines accurately. |
| IIC | 6. | Given short, familiar dictation, write shorthand fluently and read back shorthand notes accurately. |
| IID | 7. | Given a list of familiar words, form the shorthand outlines using proper proportions and correct theory construction. |
| IIIA | 8. | Given 20 sentences in which a business vocabulary word or expression is underscored, define underscored items accurately. Any incorrect words must be circled and corrected. |
| IIIB | 9. | Given a typewritten letter that contains spelling words, words belonging to family groups, and words that sound alike (some of which are spelled correctly and some incorrectly), accurately locate and circle the incorrect words and write the correct words. |
| IIIC | 10. | Given sentences in shorthand which contain no punctuation, transcribe the sentences inserting commas where necessary and identify the rule governing each comma correctly. |
| IIID | 11. | Given a shorthand plate including words containing prefixes, transcribe the plate correctly. |
| IIIE | 12. | Given a typewritten letter containing grammatical errors, identify errors and correct the grammar usage. |
| IIIF &J | 13. | Given a dictionary and shorthand words, phrases, and sentences on the board or the overhead projector, transcribe each correctly. |
| IIIG, J,&K | 14. | Given references and a familiar shorthand letter in the textbook, transcribe the letter correctly and accurately proofread the transcription. |
| IIIH, J,&K | 15. | Given a dictionary and a letter from shorthand notes written as homework, transcribe the letter correctly and accurately proofread the transcription. |

## OBJECTIVES – SHORTHAND I (FIRST PHASE)

IIII, J&K 16. Given a dictionary, references, and dictation from familiar material, take shorthand notes, transcribe notes accurately, proofread the transcription, and circle typographical errors.

## SHORTHAND I CHECKLIST
## (FIRST PHASE)

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Spells phonetically and reads outlines and words. | | | |
| IB | Constructs shorthand outlines for abbreviations and for common words. | | | |
| IC | Writes outlines which comprise phrases. | | | |
| IIA | Reads familiar shorthand material. | | | |
| IIB | Writes outlines for words, sentences, and paragraphs. | | | |
| IIC | Writes shorthand from dictation and reads back notes. | | | |
| IID | Writes outlines of words using proper proportions and theory. | | | |
| IIIA | Identifies, spells, and defines business vocabulary. | | | |
| IIIB | Identifies, spells, and defines incorrectly spelled words and distinguishes between words that sound alike. | | | |
| IIIC | Applies punctuation (comma) rules. | | | |
| IIID | Defines words containing prefixes. | | | |

## SHORTHAND I CHECKLIST
## (FIRST PHASE)

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IIIE | Identifies and corrects grammatical errors. | | | |
| IIIF | Transcribes words, phrases, and sentences from board or projector. | | | |
| IIIG | Transcribes from shorthand plate. | | | |
| IIIH | Transcribes from homework notes. | | | |
| IIII | Transcribes from dictation of familiar material. | | | |
| IIIJ | Uses dictionary and other references. | | | |
| IIIK | Proofreads transcriptions. | | | |
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## COURSE OUTLINE – SHORTHAND I (SECOND PHASE)

IV. Skill Development in Formation of Outlines

- A. Review shorthand principles and theory
  - 1. Reading and writing commonly used business letter phrases
  - 2. Reading and writing abbreviations and brief/speed forms for commonly used words and their derivatives
  - 3. Constructing outlines for words having common beginnings or endings
  - 4. Constructing outlines for words using blends of consonants and vowel omissions
- B. Development of accuracy and speed in taking dictation
  - 1. Taking familiar material dictation for 1-3 minutes
  - 2. Taking previewed material dictation for 1-3 minutes
  - 3. Taking and transcribing new material dictation up to 3 minutes
  - 4. Taking repetitious dictation for speed building
  - 5. Taking and transcribing office-style dictation

V. Development of Business Vocabulary

- A. Identifying business words and expressions
- B. Distinguishing between words that sound alike
- C. Writing prefixes and suffixes
- D. Identifying frequently misspelled words and spelling correctly

VI. Development of Transcription Skills

- A. Applying principles of English grammar, capitalization, punctuation, spelling, word division, and word usage
- B. Using the correct typing style for dates, addresses, amounts, etc.
- C. Typing a letter in an acceptable letter style
- D. Identifying names of cities and states and their two-letter abbreviations
- E. Proofreading transcribed material accurately
- F. Using dictionary and other references
- G. Applying effective secretarial procedures

## COMPETENCIES – SHORTHAND I (SECOND PHASE)

The student is required to demonstrate the following competencies in order to complete successfully Shorthand I (Second Phase).

IVA 1. Read and write shorthand outline phrases.

IVA 2. Read and write abbreviations for commonly used words.

IVA 3. Write word families.

IVA 4. Write shorthand outlines applying principles of blends and omissions.

IVB 5. Write shorthand from familiar dictation.

IVB 6. Write shorthand from previewed dictation.

IVB 7. Write and transcribe shorthand from new dictation.

IVB 8. Write shorthand from speed-building dictation.

IVB 9. Write and transcribe shorthand from office-style dictation.

VA 10. Identify business vocabulary.

VB 11. Distinguish between words that sound alike.

VC 12. Write prefixes and suffixes.

VD 13. Identify misspelled words and spell them correctly.

VIA 14. Apply grammar, capitalization, punctuation, spelling, word division, and word usage principles.

VIB 15. Apply correct typing style.

VIC 16. Type acceptable letter style.

VID 17. Identify names of cities and states and their two-letter abbreviations.

VIE 18. Proofread transcription.

VIF 19. Use dictionary and other references.

VIG 20. Apply effective secretarial procedures.

## OBJECTIVES – SHORTHAND I (SECOND PHASE)

IVA 1. Given a dictated list of commonly used business letter phrases, write the shorthand outlines and transcribe the list accurately.

IVA 2. Given a dictated list of commonly used words and their derivatives, write abbreviations and brief/speed forms accurately.

IVA 3. Given a list of words having common beginnings or endings and another list of shorthand outlines, match the two lists correctly.

IVA 4. Given a dictated list of words which apply the shorthand principles of blends and vowel omissions, write the shorthand outlines and transcribe the list accurately.

IVB 5. Given dictation of short, practiced letters from familiar material for one to three minutes at 60 to 80 words a minute, correctly write the shorthand outlines.

IVB 6. Given dictation of previewed material for one to three minutes at 60 to 80 words a minute, write the shorthand outlines and read back notes accurately.

IVB 7. Given dictation of new material for one to three minutes at 60 to 80 words a minute, write the shorthand outlines and transcribe notes accurately within 15 to 25 minutes.

IVB 8. Given previewed repetitious dictation at progressive speeds, correctly write the shorthand outlines of the dictated material.

IVB 9. Given office-style dictation of new material for three minutes at 60 to 80 words a minute, write the shorthand and transcribe the material accurately.

VA 10. Given an objective test of 20 vocabulary words and expressions and 20 definitions, match the two lists correctly.

VB 11. Given 20 sentences containing pairs of words that sound alike, accurately choose the word best suited to the context of the sentences.

VC 12. Given sentences which contain blanks and a list of words which contain prefixes spelled correctly and incorrectly, choose the word best suited for each sentence.

VD 13. Given a paragraph containing frequently misspelled words, identify the misspelled words and spell each correctly.

VIA 14. Given dictation of a letter containing previewed material, accurately transcribe the letter applying principles of grammar, capitalization, punctuation, spelling, word division, and word usage.

VIB 15. Given the transcript of a letter in which dates, addresses, amounts, etc. are typed incorrectly, correct all errors.

VIC 16. Given a business letter from textbook shorthand plate, correctly transcribe mailable letter in an acceptable letter style.

## OBJECTIVES – SHORTHAND I (SECOND PHASE)

VID 17. Given 20 shorthand sentences in which the names of cities appear, accurately transcribe the cities and supply the states using their two-letter abbreviations.

VIE 18. Given the transcript of a letter with various types of transcribing errors, proofread and circle all the errors.

VIF 19. Given a dictionary, references, and a list of correctly and incorrectly spelled words, foreign expressions, and state abbreviations, identify the misspelled items and spell each correctly.

VIG 20. Given a decision-making situation concerning secretarial procedures, read the situation and decide the best action to take.

# SHORTHAND I CHECKLIST
## (SECOND PHASE)

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IVA | Reads and writes shorthand outline phrases. | | | |
| IVA | Reads and writes abbreviations for commonly used words. | | | |
| IVA | Writes word families. | | | |
| IVA | Writes shorthand outlines applying principles of blends and omissions. | | | |
| IVB | Writes shorthand from familiar dictation. | | | |
| IVB | Writes shorthand from previewed dictation. | | | |
| IVB | Writes and transcribes shorthand from new dictation. | | | |
| IVB | Writes shorthand from speed-building dictation. | | | |
| IVB | Writes and transcribes shorthand from office-style dictation. | | | |
| VA | Identifies business vocabulary. | | | |
| VB | Distinguishes between words that sound alike. | | | |

## SHORTHAND I CHECKLIST
## (SECOND PHASE)

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VC | Writes prefixes and suffixes. | | | |
| VD | Identifies misspelled words and spells them correctly. | | | |
| VIA | Applies grammar, capitalization, punctuation, spelling, word division, and word usage principles. | | | |
| VIB | Applies correct typing style. | | | |
| VIC | Types acceptable letter style. | | | |
| VID | Identifies names of cities and states and their two-letter abbreviations. | | | |
| VIE | Proofreads transcription. | | | |
| VIF | Uses dictionary and other references. | | | |
| VIG | Applies effective secretarial procedures. | | | |
| | | | | |
| | | | | |

| PROFICIENCY RATING | |
|---|---|
| Scale Value | Definition |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

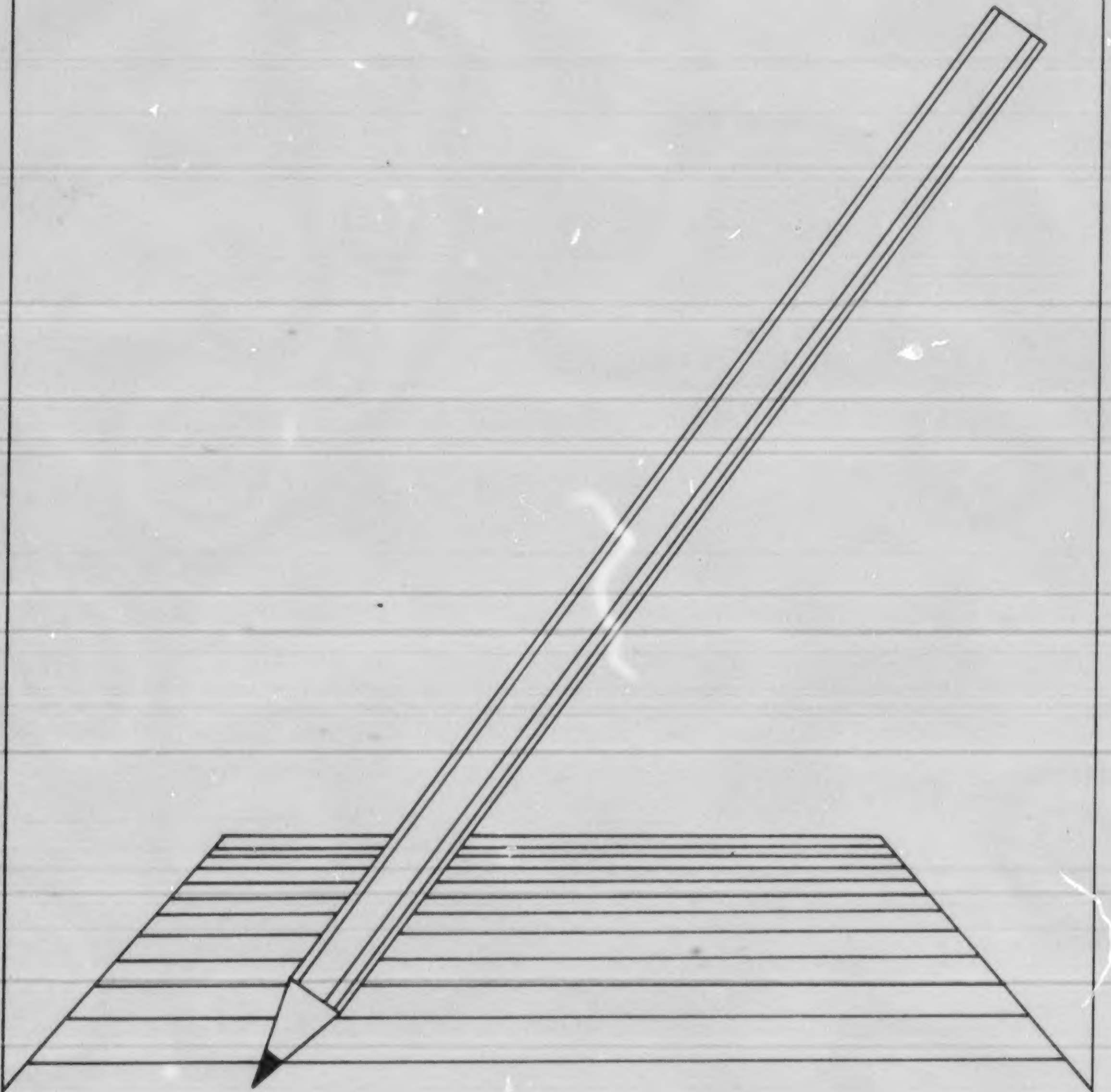
In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________



# SHORTHAND II

## SHORTHAND II

### Description

This course is designed to cover the study of advanced dictation and transcription. The proficiencies obtained in Shorthand I are extended through a review of shorthand theory and through a continued emphasis on the mechanics of English and transcription techniques.

### Purpose

The purpose of this course is to develop vocational competence by building speed and accuracy in taking dictation and in transcribing mailable copy.

## COURSE OUTLINE – SHORTHAND II (FIRST PHASE)

I. Review of Shorthand Principles and Theory

   A. Writing shorthand phrases, word beginnings, word endings, word families, and abbreviations for commonly used words
   B. Reading and writing shorthand outlines using correct shorthand principles to construct outlines for unfamiliar words

II. Skill Development

   A. Reading shorthand plates and homework notes, writing in shorthand, and transcribing (letters and memoranda) in mailable copy
   B. Writing drills designed to refine shorthand penmanship accurately
   C. Taking dictation to build speed

III. Mechanics of English

   A. Transcribing using advanced punctuation skills
   B. Identifying the most frequently used principles of grammar to avoid common grammatical errors
   C. Spelling and syllabicating words
   D. Transcribing words that sound alike
   E. Pronouncing, spelling, and defining business vocabulary words and expressions
   F. Transcribing common prefixes and suffixes

IV. Development of Transcription Techniques

   A. Preparing for taking dictation
      1. Gather necessary information and reference books
      2. Organize work area
      3. Check and organize supplies (notebook, pens, letterhead, envelopes, carbons)
   B. Taking office-style dictation
      1. Use shorthand notebook efficiently
      2. Make deletions, extensive changes, or long insertions
      3. Devise fluent phrases for expressions that occur frequently
      4. Use interruptions in dictation to read over notes
   C. Transcribing shorthand notes
      1. Follow all instructions
      2. Prepare carbon packs
      3. Place letter attractively on letterhead by judgment
      4. Type letter in correct letter style
      5. Keep eyes on shorthand notes while typing
      6. Find and correct any errors in dictation
      7. Use dictionary and other references
      8. Make corrections on original and copies
   D. Post-transcribing practices
      1. Proofread for mailability
      2. Correct errors to be unnoticeable
      3. Address envelope
      4. Include all necessary enclosures
      5. Submit letters for signature

## COMPETENCIES – SHORTHAND II (FIRST PHASE)

The student is required to demonstrate the following competencies in order to complete successfully Shorthand II (First Phase).

IA 1. Write shorthand phrases, words with common word beginnings and word endings, and abbreviations.

IB 2. Read and write shorthand illustrating various principles.

IIA 3. Read, write, and transcribe shorthand plates of business letters and memos.

IIB 4. Write shorthand words accurately.

IIC 5. Transcribe speed-building materials in mailable copy.

IIIA 6. Transcribe dictation in mailable copy punctuating correctly.

IIIB 7. Identify grammatical errors and make corrections.

IIIC 8. Spell and syllabicate words.

IIID 9. Transcribe dictation containing similar words.

IIIE 10. Pronounce, spell, and define business vocabulary.

IIIF 11. Transcribe dictation containing words with prefixes and suffixes.

IVA 12. Demonstrate efficient predictation preparation.

IVB 13. Demonstrate efficient office-style dictation practices.

IVC 14. Demonstrate efficient transcribing techniques.

IVD 15. Demonstrate efficient post-transcription practices.

## OBJECTIVES – SHORTHAND II (FIRST PHASE)

IA 1. Given a dictated list of phrases, words with common word beginnings and word endings, and abbreviations, write shorthand outlines and transcribe correctly.

IB 2. Given a shorthand plate illustrating various shorthand principles, read the plate and write the material from dictation accurately.

IIA 3. Given shorthand plates of business letters and memoranda, read fluently, write from dictation, and transcribe the material accurately in mailable copy.

IIB 4. Given a list of words, write the shorthand accurately, showing correct outline proportions.

IIC 5. Given three minutes of speed-building dictation, transcribe a correct mailable copy.

IIIA 6. Given dictation containing punctuation applications, transcribe a correct mailable copy.

IIIB 7. Given a letter containing grammatical errors, correctly identify the errors and make all corrections.

IIIC 8. Given a list of words, spell and syllabicate each word accurately.

IIID 9. Given dictation containing previewed words that sound alike, transcribe notes and spell each similar word correctly.

IIIE 10. Given a list of business vocabulary words and expressions, pronounce, spell, and define all words correctly.

IIIF 11. Given dictation including words containing common prefixes and suffixes, transcribe each word correctly.

IVA 12. Given the necessary equipment for dictation and transcription, demonstrate efficient predictation preparation including gathering necessary information and references, organizing work area, and checking and organizing supplies. All items must be rated as acceptable.

IVB 13. Given office-style dictation, demonstrate efficient dictation practices including using shorthand notebook effectively; making deletions, extensive changes, or long insertions; devising fluent phrases for expressions which occur frequently; and using interruptions in dictation productively. All items must be rated as acceptable.

IVC 14. Given dictation of business letters, transcribe shorthand notes accurately and demonstrate efficient transcribing techniques by correctly following instructions, preparing carbons appropriately, typing letters in appropriate style with proper placement, keeping eyes on notes while typing, finding and correcting errors in dictation, using dictionary and other references, and making necessary corrections. All items must be rated as acceptable.

## OBJECTIVES – SHORTHAND II (FIRST PHASE)

IVD 15. Given dictation of business letters, transcribe notes accurately. Proofread letters for mailability, correct all errors so they are unnoticeable, address envelopes correctly, include all necessary enclosures, and submit completed letters for appropriate signature.

## SHORTHAND II CHECKLIST
## (FIRST PHASE)

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Writes shorthand phrases, words with common word beginnings and word endings, and abbreviations. | | | |
| IB | Reads and writes shorthand illustrating various principles. | | | |
| IIA | Reads, writes, and transcribes shorthand plates of business letters and memos. | | | |
| IIB | Writes shorthand words accurately. | | | |
| IIC | Transcribes in mailable copy speed-building materials. | | | |
| IIIA | Transcribes dictation in mailable copy punctuating correctly. | | | |
| IIIB | Identifies grammatical errors and makes corrections. | | | |
| IIIC | Spells and syllabicates words correctly. | | | |
| IIID | Transcribes dictation containing similar words. | | | |
| IIIE | Pronounces, spells, and defines business vocabulary. | | | |
| IIIF | Transcribes dictation containing words with prefixes and suffixes. | | | |

## SHORTHAND II CHECKLIST
## (FIRST PHASE)

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IVA | Demonstrates efficient predictation preparation. | | | |
| IVB | Demonstrates efficient office-style dictation practices. | | | |
| IVC | Demonstrates efficient transcribing techniques. | | | |
| IVD | Demonstrates efficient post-transcription practices. | | | |
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## COURSE OUTLINE – SHORTHAND II (SECOND PHASE)

V. Review Shorthand Principles and Develop Skill in Outline Construction

- A. Spelling phonetically and reading outlines in which letters of the alphabet are used
- B. Constructing words containing common word-building problems and using principles of analogy to increase ability to construct outlines for unfamiliar words in common word-building problems
- C. Constructing frequently used surnames and geographic names
- D. Constructing the most frequently used business letter phrases
- E. Reading and writing shorthand word beginnings and endings
- F. Writing abbreviations and brief/speed forms for commonly used words and their derivatives

VI. Development of Writing Skills and Dictation Speed

- A. Transcribing in mailable copy business letters and articles using terms representative of varied businesses and industries
- B. Transcribing in mailable copy previewed material designed to develop speed
- C. Transcribing in mailable copy previewed material designed to develop endurance
- D. Taking repetitious dictation exercises which progressively increase in speed
- E. Writing accurate outlines using correct proportions

VII. Development of Transcription Skills

- A. Transcribing selected material designed to increase vocabulary and spelling ability
- B. Transcribing using advanced punctuation principles and rules
- C. Transcribing homonyms and words that have similarity in sound
- D. Producing mailable transcripts within an acceptable time period
- E. Applying efficient office procedures and practices and demonstrating desirable personal traits

## COMPETENCIES – SHORTHAND II (SECOND PHASE)

The student is required to demonstrate the following competencies in order to complete successfully Shorthand II (Second Phase).

VA 1. Spell phonetically and read outlines containing all situations in which letters of the alphabet are used.

VB 2. Construct outlines for unfamiliar words.

VC 3. Construct outlines for surnames and geographic names.

VD 4. Construct outlines for frequently used phrases.

VE 5. Read and write outlines for word beginnings and endings.

VF 6. Write shorthand abbreviations for commonly used words.

VIA 7. Transcribe dictation containing specialized vocabulary.

VIB 8. Transcribe dictation at increased speed.

VIC 9. Transcribe dictation given for a period of three to five minutes.

VID 10. Take dictation at progressively increased speeds.

VIE 11. Write accurate and well-proportioned outlines.

VIIA 12. Transcribe dictation with correct spelling.

VIIB 13. Transcribe dictation using correct punctuation.

VIIC 14. Transcribe material correctly using words which sound alike.

VIID 15. Produce mailable transcripts in an acceptable time period.

VIIE 16. Demonstrate desirable office procedures and personal traits.

## OBJECTIVES – SHORTHAND II (SECOND PHASE)

VA 1. Given transparencies containing outlines which review situations in which the letters of the alphabet are used, accurately spell phonetically and read rapidly.

VB 2. Given a list of unfamiliar words which contain a common word-building problem, fluently and correctly construct outlines for words using the principles of analogy.

VC 3. Given a list containing frequently used surnames and geographic names, accurately construct outlines for names.

VD 4. Given a list of the most frequently used business letter phrases, accurately construct outlines for phrases.

VE 5. Given a list of shorthand words containing common beginnings and endings, read rapidly and write the words on the list accurately.

VF 6. Given a list of commonly used words, correctly write the abbreviations in shorthand outline form.

VIA 7. Given three minutes of dictation at 80 words per minute, accurately transcribe business letters and articles containing terms representative of various businesses or industries in mailable copy.

VIB 8. Given three minutes of dictation at 80 words per minute, accurately transcribe previewed dictation (designed to develop speed) in mailable copy.

VIC 9. Given three minutes of dictation at 80 words per minute, accurately transcribe previewed material (designed to develop endurance) in mailable copy.

VID 10. Given dictation exercises which progressively increase speed, accurately complete the dictation with readable outlines.

VIE 11. Given a list of words, write accurate and well-proportioned outlines.

VIIA 12. Given selected dictation material designed to increase vocabulary and spelling ability, correctly transcribe material.

VIIB 13. Given dictation containing various punctuation requirements, transcribe using correct punctuation where necessary.

VIIC 14. Given a shorthand plate containing homonyms and similar words, accurately transcribe material.

VIID 15. Given dictation, accurately produce mailable transcription within a designated acceptable time period.

VIIE 16. Given a role-playing situation concerning an office situation, demonstrate efficient office procedures and practices, and desirable personal traits. All items must be rated as acceptable by the instructor.

## SHORTHAND II CHECKLIST
## (SECOND PHASE)

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VA | Spells phonetically and reads outlines containing all situations in which letters of the alphabet are used. | | | |
| VB | Constructs outlines for unfamiliar words. | | | |
| VC | Constructs outlines for surnames and geographic names. | | | |
| VD | Constructs outlines for frequently used phrases. | | | |
| VE | Reads and writes outlines for word beginnings and endings. | | | |
| VF | Writes shorthand abbreviation for commonly used words. | | | |
| VIA | Transcribes dictation containing specialized vocabulary. | | | |
| VIB | Transcribes dictation at increased speed. | | | |
| VIC | Transcribes dictation given for a period of three to five minutes. | | | |
| VID | Takes dictation at progressively increased speeds. | | | |
| VIE | Writes accurate and well-proportioned outlines. | | | |

## SHORTHAND II CHECKLIST
## (SECOND PHASE)

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIIA | Transcribes dictation with correct spelling. | | | |
| VIIB | Transcribes dictation using correct punctuation. | | | |
| VIIC | Transcribes material correctly using words which sound alike. | | | |
| VIID | Produces mailable transcripts in an acceptable time period. | | | |
| VIIE | Demonstrates desirable office procedures and personal traits. | | | |
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| PROFICIENCY RATING | |
|---|---|
| **Scale Value** | **Definition** |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

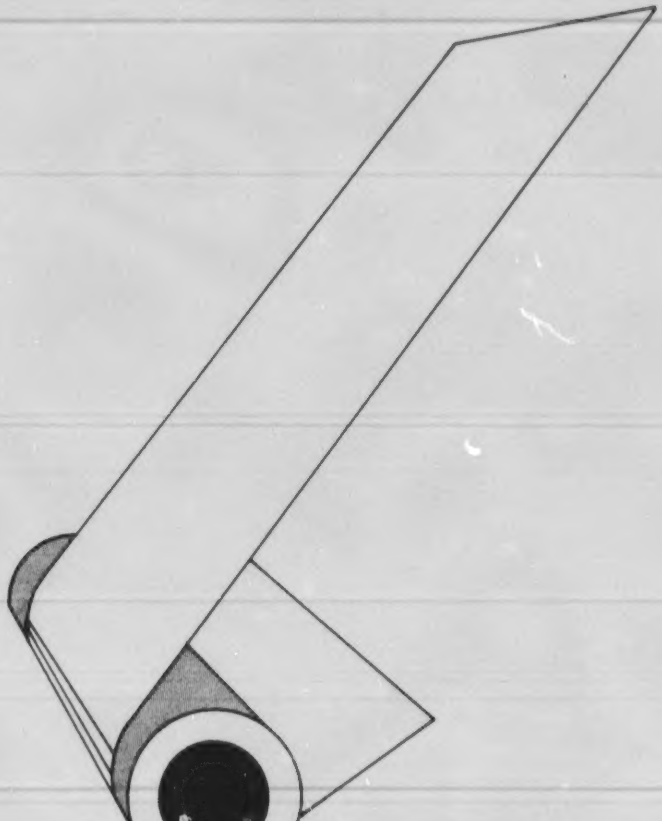
In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________



# TYPEWRITING I

# TYPEWRITING I

## Description

This course is designed to introduce the student to touch-typing techniques and to correct operation of the operative parts of the typewriter. Emphasis is placed on mastery of the keyboard, development of speed and accuracy, basic application of centering and arranging reports and letters, recognition of errors, and care of the typewriter.

## Purpose

The purpose of this course is to develop personal use skills and/or career skills on the typewriter.

## COURSE OUTLINE – TYPEWRITING I

I. Learning to Type

- A. Developing good habits
  - 1. Inserting and removing paper
  - 2. Maintaining good posture
  - 3. Using correct stroking
- B. Learning the letter keys by touch
- C. Learning to operate basic service mechanisms
- D. Learning to type figures by touch
- E. Learning to type symbols by touch

II. Improving Typing Techniques and Basic Skills

- A. Building accuracy
- B. Building speed
- C. Proofreading
- D. Making corrections

III. Typing Applied Problems

- A. Typing personal communications
- B. Preparing business letters
- C. Addressing envelopes
- D. Typing simple tables
- E. Organizing outlines
- F. Preparing carbon packs
- G. Centering material
- H. Composing content at the typewriter
- I. Typing preprinted forms
- J. Preparing and typing from rough drafts
- K. Typing manuscripts and reports with and without footnotes

IV. Improving Language Skills

- A. Applying rules for punctuation, number expression, word division, and capitalization
- B. Using proofreaders' marks
- C. Checking spelling for accuracy
- D. Checking composition for proper form

V. Developing Personal Employability Skills and Knowledge

- A. Developing office housekeeping skills
  - 1. Caring for the typewriter
  - 2. Maintaining work area
  - 3. Organizing work
- B. Developing personal relationships and attitudinal skills
  - 1. Evaluating own work
  - 2. Attending class regularly
  - 3. Arriving on time for class
  - 4. Listening to, recording, and applying oral communications
  - 5. Demonstrating job-seeking skills

## COMPETENCIES – TYPEWRITING I

The student is required to demonstrate the following competencies in order to complete successfully Typewriting I.

| | | |
|---|---|---|
| IA–E | 1. | Manipulate the letter, number, and special keys by touch and use service parts efficiently. |
| IIA–B | 2. | Demonstrate progressive improvement in speed and accuracy. |
| IIC–D | 3. | Read copy for accuracy and meaning and correct all errors. |
| IIIA | 4. | Type a personal letter. |
| IIIB | 5. | Type a business letter. |
| IIIC | 6. | Type an envelope. |
| IIID | 7. | Type a simple table. |
| IIIE | 8. | Type an outline. |
| IIIF | 9. | Type a problem using carbon pack. |
| IIIG | 10. | Center a problem vertically and horizontally. |
| IIIH | 11. | Compose a problem at the typewriter. |
| IIII | 12. | Type a preprinted form. |
| IIIJ | 13. | Type a rough draft problem and retype with corrections. |
| IIIK | 14. | Type manuscripts or reports. |
| IVA | 15. | Apply rules for punctuation, number expression, word division, and capitalization. |
| IVB | 16. | Use proofreaders' marks. |
| IVC | 17. | Check spelling. |
| IVD | 18. | Check composition. |
| VA | 19. | Demonstrate office housekeeping skills. |
| VB | 20. | Demonstrate good personal relationship skills. |
| VB | 21. | Type job-seeking data. |

## OBJECTIVES – TYPEWRITING I

IA–E 1. Given a technique checklist and necessary material to be typed, demonstrate correct typewriting techniques while typing. All techniques on the checklist must receive an acceptable rating.

IIA–B 2. Given straight copy, strike the keys by touch using the correct stroking and fingering. An acceptable rate and error level are required.

IIC 3. Given an unmarked paragraph, accurately proofread for typing and spelling errors. Read the paragraph the second time for meaning. Use proofreaders' marks to indicate all corrections to be made.

IID 4. Given ten lines of typed material containing errors, realign properly and correct all errors. Use appropriate corrective methods and materials to correct errors neatly.

IIIA 5. Given unarranged copy, type as a personal letter. Accurately determine margins and vertical placement, supply all letter parts, proofread, and correct all errors.

IIIB 6. Given unarranged copy, type the letter in any designated business style. Accurately determine margins and vertical placement, supply all letter parts and any required special lines, proofread, and correct all errors. Type an appropriate envelope in good form.

IIIC 7. Given four unarranged addresses, correctly type the addresses in appropriate form on envelopes. Determine vertical and horizontal placement. Type special lines in proper placement. Proofread and correct all errors.

IIID 8. Given a tabulation problem of five to ten lines with a main heading, columnar headings, and data to be typed in three or more columns, type the material in an acceptable form. Proofread and correct all errors.

IIIE 9. Given an outline of 12 to 15 lines with a title, Roman numerals, headings, and subtopics in unarranged form, type the material in correct outline form. Proofread and correct all errors.

IIIF 10. Given an unarranged short report, type the report in an acceptable form with three carbon copies. Proofread and correct all errors on all copies.

IIIG 11. Given ten lines of varying lengths, accurately center vertically and horizontally on various paper sizes. Proofread and correct all errors.

IIIH 12. Given a list of five subjects, compose at the typewriter in rough draft form. Accurately use proofreaders' marks to indicate corrections and retype correctly in finished manuscript form. Correct all errors.

IIII 13. Given unarranged copy of data, type the information in the appropriate columns and blanks on designated preprinted form. All data must be accurate and all errors corrected.

## OBJECTIVES – TYPEWRITING I

IIIJ 14. Given a previously typed and unmarked manuscript page, correctly use proofreaders' marks and retype in appropriate form with all errors corrected.

IIIK 15. Given two short manuscripts or reports (one with footnotes and the other without footnotes), type in acceptable form in any designated manuscript style. Determine margins and vertical placement, proofread, correct all errors, collate, and staple if appropriate.

IVA–D16. Given a rough draft manuscript of 150 to 200 words, indicate all grammatical errors and composition corrections which are needed. Indicate such changes or corrections with proofreaders' marks.

VA 17. Given an assigned work area, display desirable habits by carefully using supplies and equipment, cleaning machine, changing typewriter ribbons whenever necessary, and cleaning work station daily.

VB 18. Demonstrate ability to evaluate personal work by proofreading the typed copy accurately.

VB 19. Demonstrate punctuality and dependability by attending class regularly and arriving on time.

VB 20. Demonstrate ability to listen and to apply oral communications by starting and completing assignments on time.

VB 21. Given an application form and related material, fill in the blanks of the application form and type an appropriate letter and/or personal data sheet. All data must be accurate, all typed materials properly aligned on preprinted lines, and all errors corrected.

## TYPEWRITING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA-E | Manipulates the letter, number, and special keys by touch and uses service parts efficiently. | | | |
| IIA-B | Demonstrates progressive improvement in speed and accuracy. | | | |
| IIC-D | Reads copy for accuracy and meaning and corrects all errors. | | | |
| IIIA | Types a personal letter. | | | |
| IIIB | Types a business letter. | | | |
| IIIC | Types an envelope. | | | |
| IIID | Types a simple table. | | | |
| IIIE | Types an outline. | | | |
| IIIF | Types a problem using carbon pack. | | | |
| IIIG | Centers a problem vertically and horizontally. | | | |
| IIIH | Composes a problem at the typewriter. | | | |

## TYPEWRITING I CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IIII | Types a preprinted form. | | | |
| IIIJ | Types a rough draft problem and retypes with corrections. | | | |
| IIIK | Types manuscripts or reports. | | | |
| IVA | Applies rules for punctuation, number expression, word division, and capitalization. | | | |
| IVB | Uses proofreaders' marks. | | | |
| IVC | Checks spelling. | | | |
| IVD | Checks composition. | | | |
| VA | Demonstrates office housekeeping skills. | | | |
| VB | Demonstrates good personal relationship skills. | | | |
| VB | Types job-seeking data. | | | |
| | | | | |

| PROFICIENCY RATING | |
|---|---|
| **Scale Value** | **Definition** |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

## WORK HABITS

In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________

# TYPEWRITING II

# TYPEWRITING II

## Description

This course is designed to supervise speed and accuracy development, production of various types of business communications and reports, typing special business forms and tables, development of multiple reproduction techniques, and further refinement of efficient work habits.

## Purpose

The purpose of this course is to provide the skills and knowledge necessary for entry-level employment in office positions of which typewriting is a basic component.

## COURSE OUTLINE – TYPEWRITING II

I. Developing and Refining Typewriting Skills

II. Typing Applied Problems

- A. Business letters
    - 1. Standard styles
    - 2. Carbon copies
    - 3. Envelopes
    - 4. Form letters
    - 5. Special letter parts and notations
    - 6. Punctuation styles
- B. Tabulations
- C. Rough drafts
- D. Business forms
    - 1. Interoffice memos
    - 2. Invoices
    - 3. Purchase orders
- E. Duplication
    - 1. Spirit master copies
    - 2. Mimeograph stencils
    - 3. Photocopier models
    - 4. Carbon copies
- F. Manuscripts
- G. Statistical typing

III. Composing at the Typewriter

IV. Dictation at the Typewriter

V. Proofreading and Correcting Errors

- A. Squeezing or speeding letters
- B. Realignment
- C. Using erasers, correction tape, correction fluid

VI. Caring for the Typewriter

- A. Changing the ribbon
- B. Cleaning the keys or elements

VII. Preparing for Employment

- A. Letter of application
- B. Resume/personal data sheet
- C. Application blank

## COMPETENCIES – TYPEWRITING II

The student is required to demonstrate the following competencies in order to complete successfully Typewriting II.

| | | |
|---|---|---|
| I | 1. | Manipulate the letter, number, and special keys by touch and use service parts efficiently. |
| IIA | 2. | Type a two-page letter in acceptable form. |
| IIB | 3. | Type tabular material. |
| IIC | 4. | Type acceptable copy from rough draft copy. |
| IID | 5. | Type a memorandum. |
| IID | 6. | Type an invoice. |
| IID | 7. | Type a purchase order. |
| IIE | 8. | Type and correct spirit masters. |
| IIE | 9. | Type and correct stencils. |
| IIE | 10. | Type model copies for photocopiers. |
| IIE | 11. | Type and correct multiple carbon pack. |
| IIF | 12. | Type manuscripts. |
| IIG | 13. | Type statistical copy. |
| III | 14. | Compose at the typewriter. |
| IV | 15. | Take dictation at the typewriter. |
| V | 16. | Proofread and correct errors. |
| VI | 17. | Maintain typewriter. |
| VII | 18. | Compose and type job-seeking data. |

## OBJECTIVES – TYPEWRITING II

I 1. Given straight copy, statistical copy, rough draft copy, or script copy, strike the keys by touch using the correct stroking and fingering. An acceptable rate and error level are required.

IIA 2. Given a two-page business letter in rough draft copy, type the letter in designated letter style and punctuation style. Determine margins and vertical placement, supply all letter parts and any required special lines, proofread, correct any errors, and type an appropriate envelope in good form. A checklist will be used to rate performance. All applicable items must receive an acceptable rating.

IIB 3. Given two tables (one arranged and one unarranged), and instructions for typing, type the copy in accurate form. A checklist will be used to rate performance. All applicable items must receive an acceptable rating.

IIC 4. Given an unmarked rough draft copy of a two-page speech and instructions for typing, edit and type final copy with all errors corrected.

IID 5. Given a one-page memorandum in rough draft form and typing instructions, type the memorandum in specified format with all errors neatly corrected on both original and carbon copy.

IID 6. Given unarranged data, type the information in appropriate placement on an invoice form. All data must be accurate and all errors corrected.

IID 7. Given unarranged data, type the information in appropriate columns and blanks on a purchase order form. All data must be accurate and all errors corrected.

IIE 8. Given a one-page report, type the report in acceptable form on a spirit master. Determine horizontal and vertical placement, proofread, and make all necessary corrections.

IIE 9. Given the arranged copy of a form letter, type the body of the form letter on a stencil. Accurately determine the vertical and horizontal placement, proofread, and make all necessary corrections.

IIE 10. Given an eight-line agenda in rough draft form, type the agenda in acceptable form as a model for photocopier reproduction. Accurately determine horizontal and vertical placement, proofread, and make all necessary corrections.

IIE 11. Given a half-page memorandum, type the memorandum in acceptable form with five carbon copies. Accurately determine margins and vertical placement, supply all necessary lines, proofread, and correct all errors on all copies.

IIF 12. Given an unarranged copy of a two-page report with title, quoted material, and footnotes, type the report in acceptable form in any designated manuscript style with one carbon copy. Accurately determine margins and vertical placement, proofread, correct any errors, collate, and staple if appropriate.

## OBJECTIVES – TYPEWRITING II

IIG 13. Given a statistical report, type the report in acceptable form. Accurately determine vertical and horizontal placement, proofread, and correct all errors.

III 14. Given a list of subjects or topics, select a topic and type a composition in rough draft form as an unbound manuscript. Use proofreaders' marks to indicate required corrections. Retype in finished manuscript form. A checklist will be used to rate performance. All applicable items on rough draft and final copy must receive an acceptable rating.

IV 15. Given a business letter by dictation at the typewriter, type the letter in acceptable form. Accurately determine placement, appropriate letter style, and punctuation style; supply all letter parts; proofread; correct errors; and type an appropriate envelope in perfect form.

V 16. Given a previously typed manuscript page which has errors, realign the page properly and correct all errors. Use appropriate methods and materials to correct all errors neatly.

VI 17. Practice preventive maintenance techniques including careful operation of the typewriter, brushing the keys or element, and changing the ribbon as needed.

VII 18. Given an employment ad and an application blank, type an appropriate letter of application, resume, or personal data sheet, and fill in the blanks of the application form completely and correctly.

## TYPEWRITING II CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| I | Manipulates the letter, number, and special keys by touch and uses service parts efficiently. | | | |
| IIA | Types a two-page letter in acceptable form. | | | |
| IIB | Types tabular material. | | | |
| IIC | Types acceptable copy from rough draft copy. | | | |
| IID | Types a memorandum. | | | |
| IID | Types an invoice. | | | |
| IID | Types a purchase order. | | | |
| IIE | Types and corrects spirit masters. | | | |
| IIE | Types and corrects stencils. | | | |
| IIE | Types model copies for photocopiers. | | | |
| IIE | Types and corrects multiple carbon pack. | | | |

## TYPEWRITING II CHECKLIST

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IIF | Types manuscripts. | | | |
| IIG | Types statistical copy. | | | |
| III | Composes at the typewriter. | | | |
| IV | Takes dictation at the typewriter. | | | |
| V | Proofreads and corrects errors. | | | |
| VI | Maintains typewriter. | | | |
| VII | Composes and types job-seeking data. | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

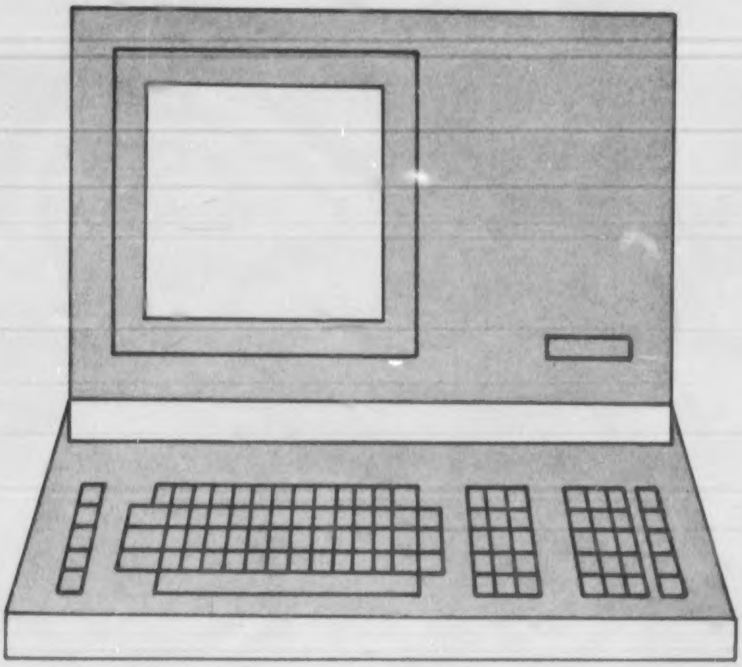
| PROFICIENCY RATING | |
|---|---|
| **Scale Value** | **Definition** |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

| WORK HABITS<br>In the instructor's opinion, this student: | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________



# WORD PROCESSING

## WORD PROCESSING

### Description

This course is designed to provide an introduction to the history, concepts, procedures, and job opportunities in word processing. Competencies are developed in both oral and written communication, equipment proficiency (keyboarding, dictation, and transcription), reprographics, records management, and dissemination.

### Purpose

The purpose of this course is to provide skills and knowledge necessary for entry-level employment in either administrative or correspondence areas of word processing.

## COURSE OUTLINE – WORD PROCESSING (ADMINISTRATIVE)

I. History, Concepts, Procedures, and Job Opportunities

  A. Defining word processing
  B. Differentiating between the traditional office system and the centralized or decentralized word processing system
  C. Tracing the history of word processing
  D. Defining word processing vocabulary terms
  E. Developing and using a word processing procedures manual
  F. Identifying word processing as one component in the total information system and understanding its relationship to other components
  G. Identifying new careers and career paths created by word processing
  H. Examining various types of word processing equipment

II. Communication Skills – Oral

  A. Stating correct techniques of effective oral communications in the explanation of procedures and directions
  B. Demonstrating correct techniques of effective oral communications in the demonstration of appropriate telephone skills
  C. Demonstrating correct techniques of oral communication in the ability to greet visitors

III. Communication Skills – Written

  A. Composing business documents using correct grammar, punctuation, spelling, and capitalization
  B. Proofreading, verifying, and editing

IV. Equipment Proficiency – Keyboarding, Dictation, and Transcription

  A. Demonstrating correct and efficient operation of keyboarding equipment
    1. Develop accuracy and speed in typing straight copy, statistical copy, reports, and other office correspondence and correcting errors using appropriate means
    2. Develop efficiency in producing final copy from rough draft
  B. Demonstrating correct operation of transcription/dictation equipment
    1. Operate transcription equipment to transcribe at a predetermined rate
    2. Develop skill in operating dictation equipment
    3. Dictate business documents using acceptable diction, pronunciation, and phrasing and provide special directions when appropriate

V. Reprographics, Records Management, and Dissemination

  A. Selecting appropriate copying method and operating equipment to produce high-quality copy
  B. Determining retention dates for word processing documents
  C. Filing using three basic filing systems
    1. Alphabetical
    2. By subject
    3. Numerical

## COURSE OUTLINE – WORD PROCESSING (ADMINISTRATIVE)

D. Establishing personal work area filing system
E. Coding word processing production on a daily log sheet
F. Processing incoming mail
G. Processing outgoing mail

## COMPETENCIES – WORD PROCESSING (ADMINISTRATIVE)

The student is required to demonstrate the following competencies in order to complete successfully Word Processing (Administrative).

IA 1. Define word processing.

IB 2. Differentiate between the traditional office system and the centralized and/or decentralized word processing system.

IC 3. Trace the history of word processing.

ID 4. Define word processing vocabulary terms.

IE 5. Develop and use a word processing procedures manual.

IF 6. Identify word processing as one component in a total information system and understand its relationship to other components.

IG 7. Identify new careers and career paths created by word processing.

IH 8. List several types of word processing equipment and their respective strengths and weaknesses.

IIA 9. Explain word processing procedures and give directions for completing the procedures.

IIB 10. Demonstrate appropriate telephone skills.

IIC 11. Greet visitors.

IIIA 12. Compose business documents.

IIIB 13. Proofread, verify, and edit documents.

IVA 14. Demonstrate correct and efficient operation of keyboarding equipment in the production of mailable copy.

IVB 15. Demonstrate correct operation of transcription/dictation equipment.

VA 16. Select appropriate copying method and operate equipment to produce high quality copy.

VB 17. Determine retention dates for word processing documents.

VC 18. File documents alphabetically, by subject, and numerically.

VD 19. Establish personal work area filing system.

VE 20. Code word processing production on a daily log sheet.

VF 21. Process incoming mail.

VG 22. Process outgoing mail.

## OBJECTIVES – WORD PROCESSING (ADMINISTRATIVE)

IA 1. Given an essay-type test, write an accurate definition of the word processing concept. The three major components of the concept must be included in the definition.

IB 2. Given an essay-type test, accurately describe the traditional office system and the centralized or decentralized word processing system. Differentiate between the systems, listing at least eight characteristics of each.

IC 3. Given a list of events in the history of word processing, accurately arrange the events in chronological order.

ID 4. Given a selected group of word processing vocabulary terms, define the terms accurately.

IE 5. Given examples of word processing procedures manuals, develop and use an appropriate word processing procedures manual.

IF 6. Given information system components, in chart form accurately show word processing as one component in the total information system. At least three components must be identified.

IG 7. Given a testing situation, illustrate a career ladder associated with word processing and show the order of horizontal and/or vertical progression. The order must be logical and realistic.

IG 8. Given a testing situation, write a sample job description for an administrative secretary. Include an accurate statement of qualifications and a description of the tasks.

IH 9. Given pictures of several types of word processing equipment, identify each and list their respective strengths and weaknesses accurately.

IIA 10. Given a situation in a word processing center, accurately explain the procedures to be followed and give correct directions for completing the procedures.

IIB 11. Given a role-playing situation, demonstrate appropriate telephone skills. The skills must be acceptable for each situation.

IIC 12. Given a role-playing situation, correctly demonstrate greeting visitors in an appropriate manner.

IIIA 13. Given situations requiring written correspondence, correctly compose appropriate business documents in mailable form.

IIIB 14. Given word processing documents, proofread, verify, and edit materials accurately. Final copy must be in mailable form.

## OBJECTIVES – WORD PROCESSING (ADMINISTRATIVE)

IVA 15. Given various types of copy and necessary equipment, demonstrate correct and efficient operation of word processing equipment in the production of accurate mailable copy.

IVB 16. Given transcription media and equipment, accurately demonstrate correct operation of the transcription equipment in the production of mailable copy at a minimum production rate of ten wpm.

IVB 17. Given dictation equipment, demonstrate correct operation of the dictation equipment in the production of audible, distinct copy.

VA 18. Given a list of items to be reproduced and a description of each item and its use, correctly select appropriate reproduction method. Produce copies of high quality.

VB 19. Given a retention schedule and a list of word processing items, determine the retention dates of each document accurately.

VC 20. Given three sets of documents (one suitable for filing alphabetically, one suitable for filing by subject, and one suitable for filing numerically), file each appropriately and accurately.

VD 21. Given ten items that the word processing secretary would need to have filed for personal reference on the job, set up an appropriate filing system. Justify the filing order.

VE 22. Given a log sheet which includes an explanation of codes and a list of word processing documents, accurately code the log sheet.

VF 23. Given ten items of mail and a date stamp, correctly process the mail as follows: open, stamp, sort, and distribute.

VG 24. Given ten items of outgoing mail, correctly process the mail as follows: seal, weigh, and affix appropriate postage.

# WORD PROCESSING CHECKLIST
## (ADMINISTRATIVE)

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IA | Defines word processing. | | | |
| IB | Differentiates between the traditional office system and the centralized and/or decentralized word processing system. | | | |
| IC | Traces the history of word processing. | | | |
| ID | Defines word processing vocabulary terms. | | | |
| IE | Develops and uses a word processing procedures manual. | | | |
| IF | Identifies word processing as one component in a total information system and understands its relationship to other components. | | | |
| IG | Identifies new careers and career paths created by word processing. | | | |
| IH | Lists several types of word processing equipment and their strengths and weaknesses. | | | |
| IIA | Explains word processing procedures and gives directions for completing the procedures. | | | |
| IIB | Demonstrates appropriate telephone skills. | | | |
| IIC | Greets visitors. | | | |

## WORD PROCESSING CHECKLIST (ADMINISTRATIVE)

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| IIIA | Composes business documents. | | | |
| IIIB | Proofreads, verifies, and edits documents. | | | |
| IVA | Demonstrates correct and efficient operation of keyboarding equipment in the production of mailable copy. | | | |
| IVB | Demonstrates correct operation of transcription/ dictation equipment. | | | |
| VA | Selects appropriate copying method and operates equipment to produce high-quality copy. | | | |
| VB | Determines retention dates for word processing documents. | | | |
| VC | Files documents alphabetically. | | | |
| VC | Files documents by subject. | | | |
| VC | Files documents numerically. | | | |
| VD | Establishes personal work area filing system. | | | |
| VE | Codes word processing production on a daily log sheet. | | | |

## WORD PROCESSING CHECKLIST
## (ADMINISTRATIVE)

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VF | Processes incoming mail. | | | |
| VG | Processes outgoing mail. | | | |
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## COURSE OUTLINE – WORD PROCESSING (CORRESPONDENCE)

VI. History, Concepts, Procedures, and Job Opportunities

- A. Defining word processing
- B. Differentiating between the traditional office system and the centralized or decentralized word processing system
- C. Tracing the history of word processing
- D. Defining word processing vocabulary terms
- E. Developing and using a word processing procedures manual
- F. Identifying word processing as one component in the total information system and understanding its relationship to other components
- G. Identifying new careers and career paths created by word processing
- H. Identifying various types of word processing equipment

VII. Equipment Proficiency

- A. Demonstrating efficient text-editing operations
  - 1. Key, edit, revise, store, retrieve, play out, center, and underscore
  - 2. Identify types of storage mediums
  - 3. Identify types of printers
  - 4. Identify types of keyboarding equipment
- B. Demonstrating correct operation of dictation equipment
  - 1. Dictate documents using acceptable diction, pronunciation, and phrasing
  - 2. Dictate special directions, corrections, or additions/deletions
- C. Demonstrating correct operation of transcription equipment
  - 1. Operate transcription equipment features efficiently
  - 2. Transcribe using transcription equipment at an acceptable, predetermined rate

VIII. Language Skills

- A. Proofreading, verifying, and editing various types of documents
- B. Applying correct grammar, punctuation, spelling, capitalization, and word division rules

IX. Work Measurement and Organization

- A. Coding word processing production on a daily log sheet
- B. Establishing personal work area for efficient operations

## COMPETENCIES – WORD PROCESSING (CORRESPONDENCE)

The student is required to demonstrate the following competencies in order to complete successfully Word Processing (Correspondence).

VIA 1. Define word processing.

VIB 2. Differentiate between the traditional office system and the centralized and/or decentralized word processing system.

VIC 3. Trace the history of word processing.

VID 4. Define word processing vocabulary terms.

VIE 5. Develop and use a word processing procedures manual.

VIF 6. Identify word processing as one component in the total information system and understand its relationship to other components.

VIG 7. Identify new careers and career paths created by word processing.

VIH 8. Identify various types of word processing equipment and list their strengths and weaknesses.

VIIA 9. Demonstrate efficient text-editing operations.

VIIB 10. Demonstrate correct operation of dictation equipment.

VIIC 11. Demonstrate correct operation of transcription equipment.

VIIIA 12. Proofread, verify, and edit various types of documents.

VIIIB 13. Apply grammar, punctuation, spelling, capitalization, and word division rules.

IXA 14. Code word processing production on a daily log sheet.

IXB 15. Establish personal work area for efficient operations.

## OBJECTIVES – WORD PROCESSING (CORRESPONDENCE)

VIA 1. Given an essay-type test, write an accurate definition of the word processing concept. The three major components of the concept must be included in the definition.

VIB 2. Given an essay-type test, accurately describe the traditional office system and the centralized or decentralized word processing system. Differentiate between the systems, listing at least eight characteristics of each.

VIC 3. Given a list of events in the history of word processing, accurately arrange the events in chronological order.

VID 4. Given a selected group of word processing vocabulary terms, define the terms accurately.

VIE 5. Given examples of word processing procedures manuals, develop and use an appropriate word processing procedures manual.

VIF 6. Given the information system components, in chart form accurately show word processing as one component in the total information system. At least three components must be identified.

VIG 7. Given a testing situation, illustrate a career ladder associated with word processing and show the order of horizontal and/or vertical progression. The order must be logical and realistic.

VIG 8. Given a testing situation, write a sample job description for a correspondence secretary. Include an accurate statement of qualifications and a description of the tasks.

VIH 9. Given pictures of several types of word processing equipment, identify each and list their respective strengths and weaknesses accurately.

VIIA 10. Given a text-editing typewriter, demonstrate the correct and efficient operation of the features in the production of accurate mailable copy.

VIIB 11. Given dictation equipment, accurately demonstrate the correct and efficient operation of the features in the production of accurate mailable copy.

VIIC 12. Given transcription equipment, accurately demonstrate correct operation of the transcription equipment in the production of mailable copy at a minimum rate of ten wpm.

VIIIA 13. Given various word processing documents, accurately proofread, verify, and edit materials. The final copy must be mailable.

VIIIB 14. Given straight copy, statistical copy, script copy, rough draft copy, and final draft copy of various materials, apply correct grammar, punctuation, spelling, capitalization, and word division rules.

## OBJECTIVES – WORD PROCESSING (CORRESPONDENCE)

IXA 15. Given a log sheet including an explanation of codes and a list of word processing documents, code the log sheet accurately.

IXB 16. Given a desk, necessary equipment, and supplies, organize a personal work area efficiently. Justify the arrangement.

## WORD PROCESSING CHECKLIST
## (CORRESPONDENCE)

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIA | Defines word processing. | | | |
| VIB | Differentiates between the traditional office system and the centralized and/or decentralized word processing system. | | | |
| VIC | Traces the history of word processing. | | | |
| VID | Defines word processing vocabulary terms. | | | |
| VIE | Develops and uses a word processing procedures manual. | | | |
| VIF | Identifies word processing as one component in a total information system and understands its relationship to other components. | | | |
| VIG | Identifies new careers and career paths created by word processing. | | | |
| VIH | Identifies various types of word processing equipment and lists their strengths and weaknesses. | | | |
| VIIA | Demonstrates efficient text-editing operations. | | | |
| VIIB | Demonstrates correct operation of dictation equipment. | | | |
| VIIC | Demonstrates correct operation of transcription equipment. | | | |

# WORD PROCESSING CHECKLIST
# (CORRESPONDENCE)

| Task No. | Task | Final Rating | Date | Instructor's Initials |
|---|---|---|---|---|
| VIIIA | Proofreads, verifies, and edits documents. | | | |
| VIIIB | Applies correct grammar, punctuation, spelling, capitalization, and word division rules. | | | |
| IXA | Codes word processing production on a daily log sheet. | | | |
| IXB | Establishes personal work area for efficient operations. | | | |
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| PROFICIENCY RATING | |
|---|---|
| **Scale Value** | **Definition** |
| A | Accomplished |
| U | Attempted, but not accomplished |
| N/A | Not attempted |

### WORK HABITS

In the instructor's opinion, this student:

| | Satisfactory | Needs Improvement | Instructor's Initials |
|---|---|---|---|
| Begins assigned work promptly. | | | |
| Works without wasted efforts and resources. | | | |
| Follows established safety procedures without being reminded. | | | |
| Works cooperatively and courteously with others. | | | |
| Responds to evaluations and criticism with willingness to improve. | | | |
| Seeks out additional work and responsibility. | | | |

Phase I Grade ________

Phase II Grade ________

Final Grade ________

# APPENDICES

# APPENDIX A

# EQUIPMENT RECOMMENDATIONS

**CLASSROOM** Teacher's Office **NUMBER OF TEACHERS** 1

| QUANTITY | DESCRIPTION |
|---|---|
| 1 | Desk with lock |
| 1 | Arm chair, guest |
| 1 | Arm chair, swivel |
| 1 | Bookcase |
| 1 | Storage cabinet w/lock |
| 1 | Costumer |
| 1 | File cabinet, four-drawer, legal size, w/lock |
| 1 | Calculator – print/display |
| 1 | Correcting electric typewriter, writing line 15" with dual pitch |

**CLASSROOM** Accounting/Business Math/Record Keeping **NUMBER OF STUDENTS** 30

| QUANTITY | DESCRIPTION |
|---|---|
| 30 | Accounting table w/lock box, 24" x 36" |
| 30 | Adjustable posture chair w/2" diameter, soft nonmarking rubber ball bearing, swivel casters |
| 20 | Electronic print/display calculator |
| 1 | Storage cabinet w/lock |
| 1 | File cabinet, four-drawer, legal size w/lock (1 per teacher) |
| 1 | Teacher's desk, single pedestal w/lock |
| 1 | Teacher's chair, adjustable posture, upholstered in naugahyde w/2" diameter, soft nonmarking rubber ball bearing, swivel casters |
| 1 | Storage cabinet w/lock to hold calculators |
| 1 | Overhead projector lectern (13 3/8"w x 14 7/8"h) |

NOTE: Adequate electrical outlets are needed.

**CLASSROOM** Business Data Processing **NUMBER OF STUDENTS** 20

| QUANTITY | DESCRIPTION |
|---|---|
| 20 | Student desk, 24" x 36" |
| 20 | Adjustable posture chair w/2" diameter, soft nonmarking rubber ball bearing, swivel casters |
| 1 | Teacher's desk, single pedestal w/lock |
| 1 | Teacher's chair, adjustable posture, upholstered in naugahyde w/2" diameter, soft nonmarking rubber ball bearing, swivel casters |
| 2 | Storage cabinet w/lock |
| 1 | Reference rack, 10 5/8" x 8 5/8" |
| 1 | Overhead projector lectern (13 3/8"w x 14 7/8"h) |
| 10 | Micro computer (type should be determined by language which students would need in surrounding business area) |
| 2 | 132-column-wide DOT Matrix Printer |
| 1 | File cabinet, four-drawer, legal size w/lock (1 per teacher) |
| 5 | Electronic print/display calculator |

NOTE: Adequate electrical outlets are needed.

CLASSROOM Introduction to Business/Business Law/ Business Principles and Management NUMBER OF STUDENTS 30

| QUANTITY | DESCRIPTION |
|---|---|
| 30 | Student table, 24" x 36" |
| 30 | Adjustable posture chair w/2" diameter, soft nonmarking rubber ball bearing, swivel casters |
| 1 | Storage cabinet w/lock |
| 1 | Overhead projector lectern (13 3/8"w x 14 7/8"h) |
| 1 | File cabinet, four-drawer, legal size w/lock (1 per teacher) |
| 1 | Teacher's desk, single pedestal w/lock |
| 1 | Teacher's chair, adjustable posture, upholstered in naugahyde w/2" diameter, soft nonmarking rubber ball bearing, swivel casters |

**CLASSROOM** Office Supervision and Management/Business Communications/Shorthand **NUMBER OF STUDENTS** 20

| QUANTITY | DESCRIPTION |
|---|---|
| 1 | Text-editing typewriter |
| 5 | Electronic typewriter |
| 6 | Electric typewriter, 15" writing line w/dual pitch and correcting feature |
| 11 | Electric typewriter, 13" carriage (3 overhead for breakdown) |
| 20 | L-shape desk w/lock box, 42" x 24" |
| 20 | Adjustable posture chair w/2" diameter, soft nonmarking rubber ball bearing, swivel casters |
| 1 | File cabinet, four-drawer, legal size w/lock (1 per teacher) |
| 10 | Recorder/transcriber |
| 10 | Electronic print/display calculator (Office Supervision and Management only) |
| 1 | Office copier (bond) |
| 1 | Copier stand with storage and lock |
| 1 | Large paper cutter |
| 10 | Cassette player (Shorthand only), built-in mike w/recorder and player, a/c or battery, tape counter, pause control (one for each 3 students) w/earphones |
| 1 | Machine table w/storage capacity w/locks |
| 2 | Storage cabinet w/lock |
| 1 | Postage scale |
| 2 | Multipurpose work table, 36" x 72" |
| 1 | Teacher's desk, single pedestal w/lock |

**CLASSROOM** Office Supervision and Management/ Business Communications/Shorthand Continued

**NUMBER OF STUDENTS** 20

| QUANTITY | DESCRIPTION |
|---|---|
| 1 | Teacher's chair, adjustable posture, upholstered in naugahyde w/2" diameter, soft nonmarking rubber ball bearing, swivel casters |
| 1 | Overhead projector lectern (13 3/8"w x 14 7/8"h) |
|  | Essential software<br>Ribbons<br>Correcting ribbons<br>Blank cassettes for dictation only<br>Prerecorded cassettes<br>Transparency film |

NOTE: Minimum of 50 electrical outlets required in this room. Sink with locked cabinet must also be available within this room. If wiring is not available in the room, desks with electrical leg may be purchased. Heavy duty wiring may be required for some equipment.

**CLASSROOM** Typewriting I and II Lab **NUMBER OF STUDENTS** 30

| QUANTITY | DESCRIPTION |
|---|---|
| 23 | Electric typewriter, 13" carriage (3 for breakdowns) |
| 4 | Electronic typewriter |
| 1 | Text-editing typewriter |
| 5 | Electric typewriter, 15" writing line w/dual pitch and correcting feature |
| 30 | Typewriting table w/book rack, 24" x 36", height range to be 28 3/4" to 30 3/4" |
| 30 | Adjustable posture chair w/2" diameter, soft nonmarking rubber ball bearing, swivel casters |
| 1 | Demonstration stand |
| 1 | File cabinet, four-drawer, legal size w/lock (1 per teacher) |
| 1 | Overhead projector lectern (13 3/8"w x 14 7/8"h) |
| 1 | Teacher's desk single pedestal w/lock |
| 1 | Teacher's chair, adjustable posture, upholstered in naugahyde w/2" diameter, soft nonmarking rubber ball bearing, swivel casters |
| 1 | Storage cabinet w/lock |
| 1 | Large paper cutter |
|  | Essential software<br>Ribbons<br>Correcting ribbons |

NOTE: Adequate electrical outlets are needed.

CLASSROOM Word Processing

NUMBER OF STUDENTS 20

| QUANTITY | DESCRIPTION |
|---|---|
| 3 | Text-editing typewriter with CRT screen and printer |
| 6 | Electronic typewriter |
| 12 | Electric typewriter, 15" writing line w/dual pitch and correcting feature |
| 20 | L-shape desk w/lock box, 42" x 24" |
| 20 | Adjustable posture chair w/2" diameter, soft nonmarking rubber ball bearing, swivel casters |
| 1 | File cabinet, four-drawer, legal size w/lock (1 per teacher) |
| 10 | Recorder/transcriber |
| 2 | Storage cabinet w/lock |
| 1 | Multipurpose work table, 36" x 72" |
| 1 | Teacher's desk, single pedestal w/lock |
| 1 | Teacher's chair, adjustable posture, upholstered in/naugahyde w/2" diameter, soft nonmarking rubber ball bearing, swivel casters |
| 1 | Overhead projector lectern (13 3/8"w x 14 7/8"h) |
|  | Essential software |
|  | Ribbons<br>Correcting ribbons<br>Blank cassettes for dictation units<br>Prerecorded cassettes<br>Software for word processing equipment |

NOTE: A minimum of 35 electrical outlets is required in this room.

# APPENDIX B

# RECOMMENDED GRADING SCALES FOR KEYBOARDING AND SHORTHAND

# TYPEWRITING I GRADING SCALE*
# FOR
# STATISTICAL AND ROUGH DRAFT COPY

| GRADE | 1st 9 weeks | | 2nd 9 weeks | | 3rd 9 weeks | | 4th 9 weeks | |
|---|---|---|---|---|---|---|---|---|
| Place letter grade in this column to correspond with the number grades in the other columns for your school. Then, for easy reference, draw a line across the page separating each letter grade. | 20+ NWAM | 100+ | 25+ NWAM | 100+ | 30+ NWAM | 100+ | 35+ NWAM | 100+ |
| | 19 | 99 | 24 | 99 | 29 | 99 | 34 | 99 |
| | 18 | 98 | 23 | 98 | 28 | 98 | 33 | 98 |
| | 17 | 97 | 22 | 97 | 27 | 97 | 32 | 97 |
| | 16 | 96 | 21 | 96 | 26 | 96 | 31 | 96 |
| | 15 | 95 | 20 | 95 | 25 | 95 | 30 | 95 |
| | 14 | 94 | 19 | 94 | 24 | 94 | 29 | 94 |
| | 13 | 93 | 18 | 93 | 23 | 93 | 28 | 93 |
| | 12 | 92 | 17 | 92 | 22 | 92 | 27 | 92 |
| | 11 | 91 | 16 | 91 | 21 | 91 | 26 | 91 |
| | 10 | 90 | 15 | 90 | 20 | 90 | 25 | 90 |
| | 9 | 89 | 14 | 89 | 19 | 89 | 24 | 89 |
| | 8 | 88 | 13 | 88 | 18 | 88 | 23 | 88 |
| | 7 | 87 | 12 | 87 | 17 | 87 | 22 | 87 |
| | 6 | 86 | 11 | 86 | 16 | 86 | 21 | 86 |
| | 5 | 85 | 10 | 85 | 15 | 85 | 20 | 85 |
| | 4 | 84 | 9 | 84 | 14 | 84 | 19 | 84 |
| | 3 | 83 | 8 | 83 | 13 | 83 | 18 | 83 |
| | 2 | 82 | 7 | 82 | 12 | 82 | 17 | 82 |
| | 1 | 81 | 6 | 81 | 11 | 81 | 16 | 81 |
| | 0 | 80 | 5 | 80 | 10 | 80 | 15 | 80 |
| | | | 4 | 79 | 9 | 79 | 14 | 79 |
| | Below 0 | 75 | 3 | 78 | 8 | 78 | 13 | 78 |
| | | | 2 | 77 | 7 | 77 | 12 | 77 |
| | | | 1 | 76 | 6 | 76 | 11 | 76 |
| | | | 0 | 75 | 5 | 75 | 10 | 75 |
| | | | | | 4 | 74 | 9 | 74 |
| | | | Below 0 | 70 | 3 | 73 | 8 | 73 |
| | | | | | 2 | 72 | 7 | 72 |
| | | | | | 1 | 71 | 6 | 71 |
| | | | | | 0 | 70 | 5 | 70 |
| | | | | | | | 4 | 69 |
| | | | | | Below 0 | 65 | 3 | 68 |
| | | | | | | | 2 | 67 |
| | | | | | | | 1 | 66 |
| | | | | | | | 0 | 65 |
| | | | | | | | | |
| | | | | | | | Below 0 | 60 |

*Based on NWAM
NWAM – GWAM minus 2/error

## TYPEWRITING I GRADING SCALE*
## FOR
## STATISTICAL AND ROUGH DRAFT COPY

| GRADE | 1st 9 weeks | | 2nd 9 weeks | | 3rd 9 weeks | | 4th 9 weeks | |
|---|---|---|---|---|---|---|---|---|
| | 25+ NWAM | 100+** | 30+ NWAM | 100+ | 35+ NWAM | 100+ | 40+ NWAM | 100+ |
| | 24 | 99 | 29 | 99 | 34 | 99 | 39 | 99 |
| | 23 | 98 | 28 | 98 | 33 | 98 | 38 | 98 |
| | 22 | 97 | 27 | 97 | 32 | 97 | 37 | 97 |
| | 21 | 96 | 26 | 96 | 31 | 96 | 36 | 96 |
| | 20 | 95 | 25 | 95 | 30 | 95 | 35 | 95 |
| | 19 | 94 | 24 | 94 | 29 | 94 | 34 | 94 |
| | 18 | 93 | 23 | 93 | 28 | 93 | 33 | 93 |
| | 17 | 92 | 22 | 92 | 27 | 92 | 32 | 92 |
| | 16 | 91 | 21 | 91 | 26 | 91 | 31 | 91 |
| | 15 | 90 | 20 | 90 | 25 | 90 | 30 | 90 |
| | 14 | 89 | 19 | 89 | 24 | 89 | 29 | 89 |
| | 13 | 88 | 18 | 88 | 23 | 88 | 28 | 88 |
| | 12 | 87 | 17 | 87 | 22 | 87 | 27 | 87 |
| | 11 | 86 | 16 | 86 | 21 | 86 | 26 | 86 |
| | 10 | 85 | 15 | 85 | 20 | 85 | 25 | 85 |
| | 9 | 84 | 14 | 84 | 19 | 84 | 24 | 84 |
| | 8 | 83 | 13 | 83 | 18 | 83 | 23 | 83 |
| | 7 | 82 | 12 | 82 | 17 | 82 | 22 | 82 |
| | 6 | 81 | 11 | 81 | 16 | 81 | 21 | 81 |
| | 5 | 80 | 10 | 80 | 15 | 80 | 20 | 80 |
| | 4 | 79 | 9 | 79 | 14 | 79 | 19 | 79 |
| | 3 | 78 | 8 | 78 | 13 | 78 | 18 | 78 |
| | 2 | 77 | 7 | 77 | 12 | 77 | 17 | 77 |
| | 1 | 76 | 6 | 76 | 11 | 76 | 16 | 76 |
| | 0 | 75 | 5 | 75 | 10 | 75 | 15 | 75 |
| | | | 4 | 74 | 9 | 74 | 14 | 74 |
| | Below 0 | 65 | 3 | 73 | 8 | 73 | 13 | 73 |
| | | | 2 | 72 | 7 | 72 | 12 | 72 |
| | No F assigned | | 1 | 71 | 6 | 71 | 11 | 71 |
| | 1st 9 weeks for | | 0 | 70 | 5 | 70 | 10 | 70 |
| | speed achievement | | | | 4 | 69 | 9 | 69 |
| | | | Below 0 | 60 | 3 | 68 | 8 | 68 |
| | | | | | 2 | 67 | 7 | 67 |
| | | | No F assigned | | 1 | 66 | 6 | 66 |
| | | | 2nd 9 weeks for | | 0 | 65 | 5 | 65 |
| | | | speed achievement | | | | 4 | 64 |
| | | | | | Below 0 | 60 | 3 | 63 |
| | | | | | | | 2 | 62 |
| | | | | | | | 1 | 61 |
| | | | | | | | 0 | 60 |
| | | | | | | | Below 0 | 55 |

Place letter grade in this column to correspond with the number grades in the other columns for your school. Then, for easy reference, draw a line across the page separating each letter grade.

*Based on NWAM
NWAM = GWAM minus 2/error

**To allow for students who excel in the area of speed development in any grading period, perhaps the teacher should add 1 point to 100 for each word per minute above the maximum speed allowance. (A student who types 28 wpm the first 9 weeks has earned a grade of 103--100 + 3 extra points.)

# TYPEWRITING II GRADING SCALE*
# FOR
# STATISTICAL AND ROUGH DRAFT COPY

Place letter grade in this column to correspond with the number grades in the other columns for your school. Then, for easy reference, draw a line across the page separating each letter grade.

| GRADE | 1st 9 weeks | | 2nd 9 weeks | | 3rd 9 weeks | | 4th 9 weeks | |
|---|---|---|---|---|---|---|---|---|
| | 35+ NWAM | 100+ | 40+ NWAM | 100+ | 45+ NWAM | 100+ | 50+ NWAM | 100+ |
| | 34 | 99 | 39 | 99 | 44 | 99 | 49 | 99 |
| | 33 | 98 | 38 | 98 | 43 | 98 | 48 | 98 |
| | 32 | 97 | 37 | 97 | 42 | 97 | 47 | 97 |
| | 31 | 96 | 36 | 96 | 41 | 96 | 46 | 96 |
| | 30 | 95 | 35 | 95 | 40 | 95 | 45 | 95 |
| | 29 | 94 | 34 | 94 | 39 | 94 | 44 | 94 |
| | 28 | 93 | 33 | 93 | 38 | 93 | 43 | 93 |
| | 27 | 92 | 32 | 92 | 37 | 92 | 42 | 92 |
| | 26 | 91 | 31 | 91 | 36 | 91 | 41 | 91 |
| | 25 | 90 | 30 | 90 | 35 | 90 | 40 | 90 |
| | 24 | 89 | 29 | 89 | 34 | 89 | 39 | 89 |
| | 23 | 88 | 28 | 88 | 33 | 88 | 38 | 88 |
| | 22 | 87 | 27 | 87 | 32 | 87 | 37 | 87 |
| | 21 | 86 | 26 | 86 | 31 | 86 | 36 | 86 |
| | 20 | 85 | 25 | 85 | 30 | 85 | 35 | 85 |
| | 19 | 84 | 24 | 84 | 29 | 84 | 34 | 84 |
| | 18 | 83 | 23 | 83 | 28 | 83 | 33 | 83 |
| | 17 | 82 | 22 | 82 | 27 | 82 | 32 | 82 |
| | 16 | 81 | 21 | 81 | 26 | 81 | 31 | 81 |
| | 15 | 80 | 20 | 80 | 25 | 80 | 30 | 80 |
| | 14 | 79 | 19 | 79 | 24 | 79 | 29 | 79 |
| | 13 | 78 | 18 | 78 | 23 | 78 | 28 | 78 |
| | 12 | 77 | 17 | 77 | 22 | 77 | 27 | 77 |
| | 11 | 76 | 16 | 76 | 21 | 76 | 26 | 76 |
| | 10 | 75 | 15 | 75 | 20 | 75 | 25 | 75 |
| | 9 | 74 | 14 | 74 | 19 | 74 | 24 | 74 |
| | 8 | 73 | 13 | 73 | 18 | 73 | 23 | 73 |
| | 7 | 72 | 12 | 72 | 17 | 72 | 22 | 72 |
| | 6 | 71 | 11 | 71 | 16 | 71 | 21 | 71 |
| | 5 | 70 | 10 | 70 | 15 | 70 | 20 | 70 |
| | 4 | 69 | 9 | 69 | 14 | 69 | 19 | 69 |
| | 3 | 68 | 8 | 68 | 13 | 68 | 18 | 68 |
| | 2 | 67 | 7 | 67 | 12 | 67 | 17 | 67 |
| | 1 | 66 | 6 | 66 | 11 | 66 | 16 | 66 |
| | 0 | 65 | 5 | 65 | 10 | 65 | 15 | 65 |
| | | | 4 | 64 | 9 | 64 | 14 | 64 |
| | Below 0 | 60 | 3 | 63 | 8 | 63 | 13 | 63 |
| | | | 2 | 62 | 7 | 62 | 12 | 62 |
| | | | 1 | 61 | 6 | 61 | 11 | 61 |
| | | | 0 | 60 | 5 | 60 | 10 | 60 |
| | | | | | 4 | 59 | 9 | 59 |
| | | | Below 0 | 55 | 3 | 58 | 8 | 58 |
| | | | | | 2 | 57 | 7 | 57 |
| | | | | | 1 | 56 | 6 | 56 |
| | | | | | 0 | 55 | 5 | 55 |
| | | | | | | | 4 | 54 |
| | | | | | Below 0 | 50 | 3 | 53 |
| | | | | | | | 2 | 52 |
| | | | | | | | 1 | 51 |
| | | | | | | | 0 | 50 |
| | | | | | | | Below 0 | 45 |

*Based on NWAM
NWAM = GWAM minus 2/error

# TYPEWRITING II GRADING SCALE*
# FOR
# STATISTICAL AND ROUGH DRAFT COPY

Place letter grade in this column to correspond with the number grades in the other columns for your school. Then, for easy reference, draw a line across the page separating each letter grade.

| GRADE | 1st 9 weeks | | 2nd 9 weeks | | 3rd 9 weeks | | 4th 9 weeks | |
|---|---|---|---|---|---|---|---|---|
| | 40+ NWAM | 100+** | 45+ NWAM | 100+ | 50+ NWAM | 100+ | 55+ NWAM | 100+ |
| | 39 | 99 | 44 | 99 | 49 | 99 | 54 | 99 |
| | 38 | 98 | 43 | 98 | 48 | 98 | 53 | 98 |
| | 37 | 97 | 42 | 97 | 47 | 97 | 52 | 97 |
| | 36 | 96 | 41 | 96 | 46 | 96 | 51 | 96 |
| | 35 | 95 | 40 | 95 | 45 | 95 | 50 | 95 |
| | 34 | 94 | 39 | 94 | 44 | 94 | 49 | 94 |
| | 33 | 93 | 38 | 93 | 43 | 93 | 48 | 93 |
| | 32 | 92 | 37 | 92 | 42 | 92 | 47 | 92 |
| | 31 | 91 | 36 | 91 | 41 | 91 | 46 | 91 |
| | 30 | 90 | 35 | 90 | 40 | 90 | 45 | 90 |
| | 29 | 89 | 34 | 89 | 39 | 89 | 44 | 89 |
| | 28 | 88 | 33 | 88 | 38 | 88 | 43 | 88 |
| | 27 | 87 | 32 | 87 | 37 | 87 | 42 | 87 |
| | 26 | 86 | 31 | 86 | 36 | 86 | 41 | 86 |
| | 25 | 85 | 30 | 85 | 35 | 85 | 40 | 85 |
| | 24 | 84 | 29 | 84 | 34 | 84 | 39 | 84 |
| | 23 | 83 | 28 | 83 | 33 | 83 | 38 | 83 |
| | 22 | 82 | 27 | 82 | 32 | 82 | 37 | 82 |
| | 21 | 81 | 26 | 81 | 31 | 81 | 36 | 81 |
| | 20 | 80 | 25 | 80 | 30 | 80 | 35 | 80 |
| | 19 | 79 | 24 | 79 | 29 | 79 | 34 | 79 |
| | 18 | 78 | 23 | 78 | 28 | 78 | 33 | 78 |
| | 17 | 77 | 22 | 77 | 27 | 77 | 32 | 77 |
| | 16 | 76 | 21 | 76 | 26 | 76 | 31 | 76 |
| | 15 | 75 | 20 | 75 | 25 | 75 | 30 | 75 |
| | 14 | 74 | 19 | 74 | 24 | 74 | 29 | 74 |
| | 13 | 73 | 18 | 73 | 23 | 73 | 28 | 73 |
| | 12 | 72 | 17 | 72 | 22 | 72 | 27 | 72 |
| | 11 | 71 | 16 | 71 | 21 | 71 | 26 | 71 |
| | 10 | 70 | 15 | 70 | 20 | 70 | 25 | 70 |
| | 9 | 69 | 14 | 69 | 19 | 69 | 24 | 69 |
| | 8 | 68 | 13 | 68 | 18 | 68 | 23 | 68 |
| | 7 | 67 | 12 | 67 | 17 | 67 | 22 | 67 |
| | 6 | 66 | 11 | 66 | 16 | 66 | 21 | 66 |
| | 5 | 65 | 10 | 65 | 15 | 65 | 20 | 65 |
| | 4 | 64 | 9 | 64 | 14 | 64 | 19 | 64 |
| | 3 | 63 | 8 | 63 | 13 | 63 | 18 | 63 |
| | 2 | 62 | 7 | 62 | 12 | 62 | 17 | 62 |
| | 1 | 61 | 6 | 61 | 11 | 61 | 16 | 61 |
| | 0 | 60 | 5 | 60 | 10 | 60 | 15 | 60 |
| | Below 0 | 55 | 4 | 59 | 9 | 59 | 14 | 59 |
| | | | 3 | 58 | 8 | 58 | 13 | 58 |
| | | | 2 | 57 | 7 | 57 | 12 | 57 |
| | | | 1 | 56 | 6 | 56 | 11 | 56 |
| | | | 0 | 55 | 5 | 55 | 10 | 55 |
| | | | Below 0 | 50 | 4 | 54 | 9 | 54 |
| | | | | | 3 | 53 | 8 | 53 |
| | | | | | 2 | 52 | 7 | 52 |
| | | | | | 1 | 51 | 6 | 51 |
| | | | | | 0 | 50 | 5 | 50 |
| | | | | | Below 0 | 45 | 4 | 49 |
| | | | | | | | 3 | 48 |
| | | | | | | | 2 | 47 |
| | | | | | | | 1 | 46 |
| | | | | | | | 0 | 45 |
| | | | | | | | Below 0 | 40 |

*Based on NWAM
NWAM = GWAM minus 2/error

**To allow for students who excel in the area of speed development in any grading period, perhaps the teacher should add 1 point to 100 for each word per minute above the maximum speed allowance. (A student who types 43 wpm the first 9 weeks has earned a grade of 103--100 + 3 extra points.)

## SHORTHAND I

A fair grading scale for Semester 1 of Shorthand I

| | |
|---|---|
| 60 wam | A |
| 50 wam | B |
| 40 wam | C |

A fair grading scale for Semester 2 of Shorthand I

| | |
|---|---|
| 80 wam | A |
| 70 wam | B |
| 60 wam | C |

# SHORTHAND II

A fair grading scale for Semester 1 of Shorthand II

| | |
|---|---|
| 90 wam | A |
| 80 wam | B |
| 70 wam | C |

A fair grading scale for Semester 2 of Shorthand II

| | |
|---|---|
| 100 wam | A |
| 90 wam | B |
| 80 wam | C |

# APPENDIX C

## STEPS TO THE ESTABLISHMENT OF AN FBLA CHAPTER CHARTER

# STEPS TO THE ESTABLISHMENT OF AN FBLA CHAPTER CHARTER

1. Write to the FBLA Executive Secretary, Miss Andrea Kelly, 920 Rutledge Building, 1429 Senate Street, Columbia, South Carolina 29201, requesting the FBLA Charter application packet. This packet contains a chapter application, a sample constitution, and other pertinent infomation about FBLA.

2. Attempt to get the support of all the business teachers and the school administration. Let them know what FBLA is and how it will benefit the business education students.

3. Begin a publicity campaign to interest the students in the organization. All the business teachers might take some class time to discuss it.

4. Announce an organizational meeting several days in advance.

5. At the organizational meeting, officers might be elected and temporary committees (constitution, projects, and membership) appointed in order to facilitate the prerequisites for securing a chapter charter.

6. A proposed constitution for your local chapter must be submitted to the Executive Secretary. Study the sample local constitution in the information packet and the state constitution for assistance in developing your own.

7. Submit the following items to the Executive Secretary, Miss Andrea Kelly, 920 Rutledge Building, 1429 Senate Street, Columbia, South Carolina 29201.
    a) Application for charter
    b) Copy of proposed chapter constitution and bylaws
    c) Brief description of projects which the chapter is considering
    d) List of charter members
    e) State and national membership dues for each member
    f) Chapter charter fee of $10

8. Send *two separate checks* for membership dues to the Executive Secretary. State dues are $1 per member; national dues are $2.50 per member. The check for national dues should also include the $10 charter fee. Make the check for state dues payable to South Carolina Chapter of FBLA. The check for national dues and chapter charter fee should be payable to National FBLA.

9. When the chapter charter and other materials arrive, plan a formal installation as presented in the official *FBLA Handbook*.

10. Begin plans to attend the district and state leadership conferences. Participation in these events will help make the organization more meaningful for the members.